

EXHIBIT A



Compass⁺ MARKETING
INCORPORATED

COMPASS MARKETING 101



Bausch & Lomb

HELPING **GREAT COMPANIES**
DO **GREAT THINGS**



JOHN WHITE

CHAIRMAN & CEO

Compass⁺ MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS

- Chairman & CEO Compass Marketing Inc., 13 years
- MBA Marketing & Management, University of Baltimore
- Director at Acosta before founding Compass in 1999
- President of the International Foundation for Research & Education of Depression, a 501(c)3 healthcare non-profit
- Board Member of the United Way of Maryland Campaign Committee



STRATEGIC ADVISORS TO AMERICA'S TOP CONSUMER
PRODUCT MANUFACTURERS

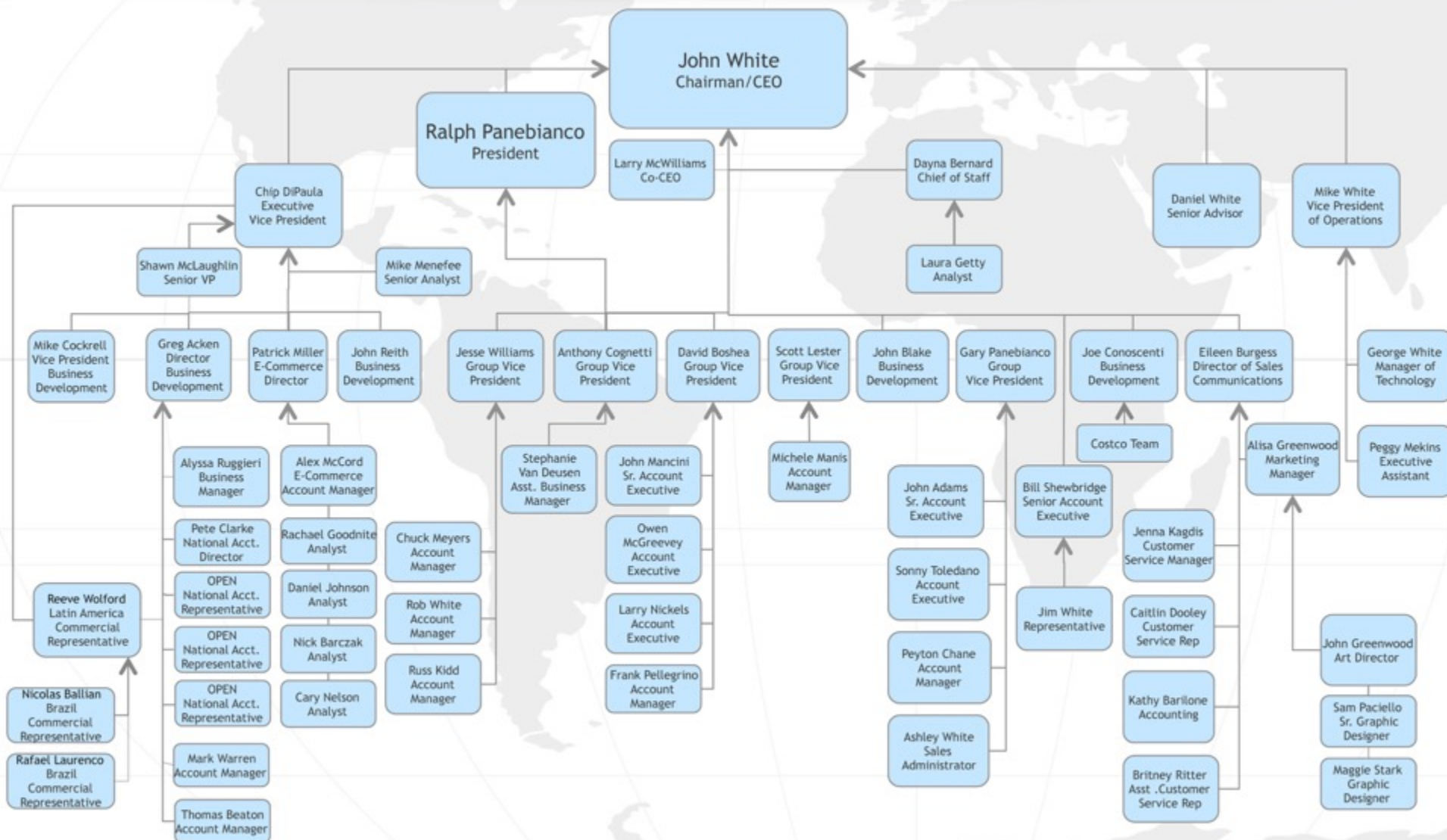
HELPING
GREAT
COMPANIES **DO**
GREAT
THINGS

COMPASS STRENGTHS

RESOURCES & EXPERIENCE



HELPING GREAT COMPANIES DO GREAT THINGS



JW & AG 2/25/13



OUR CLIENTS

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OUR BRANDS

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- Single family income is a thing of the past, both parents work.
- Less time is spent in the home.
- More products being consumed away from the home.
- Home meal replacement increases.
- Commercial and non-commercial visits are up.



CHANGING DISTRIBUTION

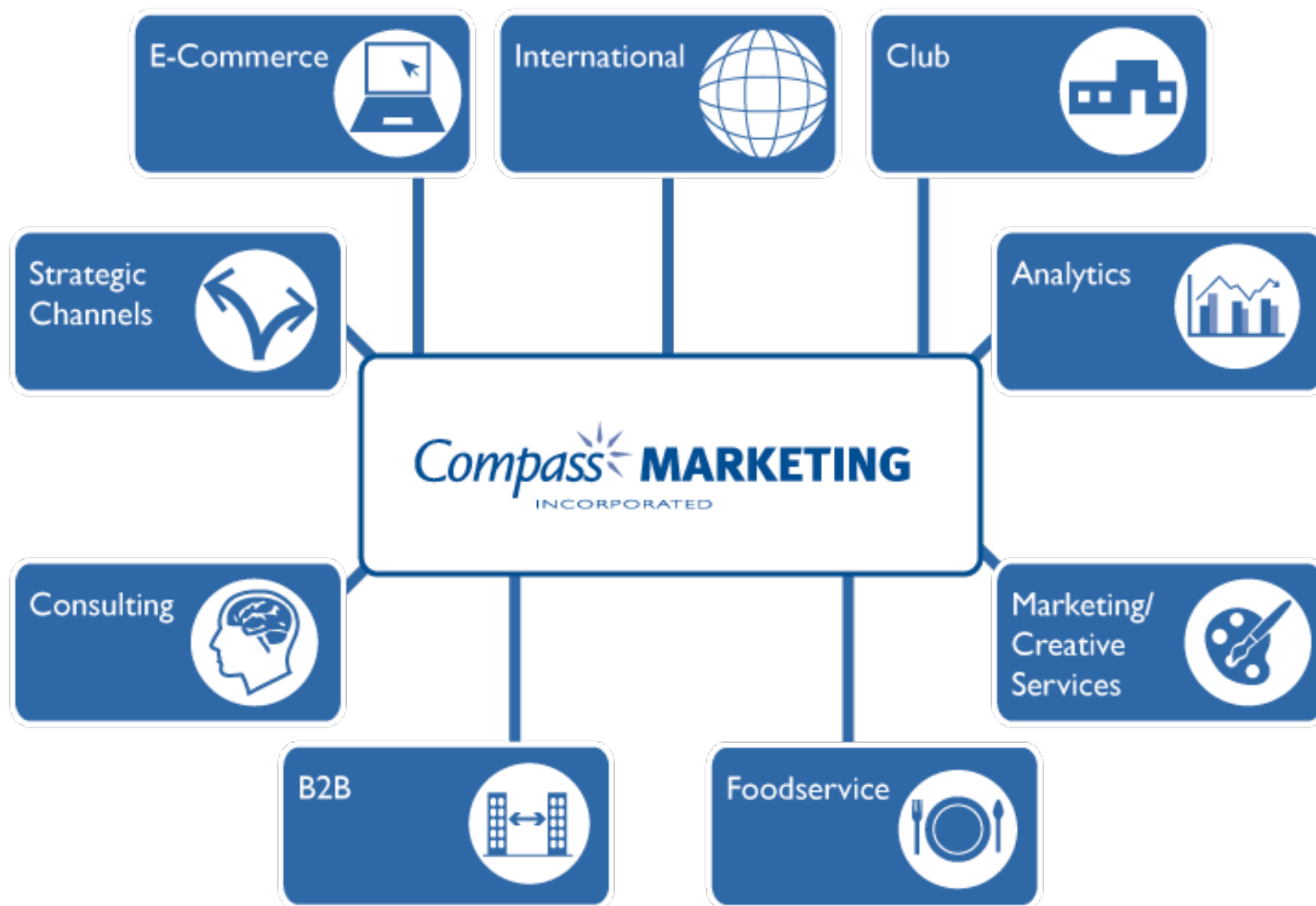
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- Non-traditional channels of distribution.
- Products sold in outlets other than retail.
- Focus on increasing points of distribution.
- Identifying truly incremental sales and consumption.





Compass Marketing is the leader in opening strategic opportunities and guiding top brands in sales and marketing. Our company is comprised of an experienced, dedicated team that is focused on maximizing revenue with a reputation for getting results.

We specialize in pioneering brands in alternate & specialty channels, E-commerce, B2B and Foodservice. Support includes a full service marketing and creative services department, analytics, consulting and strategic services.

Our relentless pursuit of our clients' goals and interests is why we are the strategic advisor to world's leading Consumer Products manufacturers.

- Headquarters in Annapolis, MD USA
- 60+ employees in 15 offices in United States, India and Brazil
- Divisions: Sales, Marketing and Creative Services, Inside Sales, Strategic Services/ Business Development, Consulting, B2B, Foodservice, Analytics, E-Commerce



- 
- Airports/ Airlines/ Duty Free
 - Travel Plazas
 - Sporting Goods
 - Office Supply Outlets
 - College Book Stores
 - Home Improvement
 - Hardware
 - Farm & Fleet
 - E-commerce
 - Foodservice National Accts.
 - Safety Supply
 - B2B
 - Arts & Crafts
 - Auto Retailers
 - Hospital Gift Shops
 - Oil & Gas Exploration
 - Home Improvement
 - Direct to Consumer Catalogs
 - Independent Dollar
 - Hunting Supply/ Fishing Supply
 - Electronic/ Entertainment Retailers
 - Home Goods
 - Record, Music and Video

Alternate channels

KEY CUSTOMERS

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Alternate Channels

KEY DISTRIBUTORS



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Academy Sports
Dick's Sporting Goods
Hancock Fabrics
Office Max
FedEx Office
Shoe Carnival
W B Mason
Staples Online
Lowe's



A C Moore
ACE Hardware
Auto Zone
Advanced Auto
Big 5 Sporting Goods
Burlington Coat Factory
Best Buy
Cabela's
Garden Ridge
Home Depot
Lowe's
Office Depot
Old Navy
Pep Boys
Tractor Supply
Tiger Direct



Blockbuster Video
Staples - Retail
Family Video
True Value
Orgill
National Amusement
Marvin's
Wheatbelt
United Hardware
Quill



- Client, Customer, Industry and Country Research and Monitoring
- Analysis of retail environments, POS data
- Website content auditing and adjacency recommendations
- Marketing and advertising planning and execution
- Sales support
- Customer Profile Database

[illegible]

FAST & FREE SHIPPING \$45 and up* on over 800,000 products

Get Your shipping is FREE*

What does your business need today?

search

\$82.39

2 CHECKOUT

Office Supplies

Furniture

Paper

Ink & Toner

Technology

Cleaning

Food & Breakroom

Shop Green

Clearance

More

You Qualify for FREE SHIPPING!

No Sales Tax in the State of MD

Your Shopping Cart

110% MONEY BACK GUARANTEE

SAFE & SECURE CHECKOUT

EASY RETURNS

FREE SHIPPING

PROCEED TO SECURE CHECKOUT

Your Items	Item Description	Item Price	Quantity	Total
	<p>Brother PT-1280 Affordable Home-Office Labeler</p> <p>Item #: BRPPT1280</p> <p>2 Lines, 6-3/10w x 6-47/50d X 2-9/25h (Details)</p>	<p>\$38.47 /Each</p> <p>Buy 3 more & pay \$3.11 /Each</p>	<p>1</p> <p>UPDATE</p> <p>Remove</p>	<p>\$38.47</p> <p>\$39.98</p>
	<p>LOGITECH, INC. M505 Wireless Mouse</p> <p>Item #: LOGI10001326</p> <p>Unifying USB Receiver, Red (Details)</p>	<p>\$43.92 /Each</p> <p>\$41.89 /Each</p>	<p>1</p> <p>UPDATE</p> <p>Remove</p>	<p>\$43.92</p> <p>\$38.90</p>

YOU HAVE ITEMS IN YOUR CART THAT REQUIRE BATTERIES.

This item requires 2 AA Batteries. We recommend:

Item # LOGI10001326

Item # DURD150084N

Duracell Rechargeable NiMH Batteries AA, 4/Pack

This item requires 3 AAA Batteries. We recommend:

Item # BRPPT1280

Item # DURM2400810Z

Duracell Coppertop Alkaline Batteries AAA, 10/Pack

ADD BATTERIES TO CART

CONTINUE SHOPPING

UPDATE ALL PRODUCTS

Subtotal: \$82.39

PT-1290 Simply Stylish Home & Office Labeler

2 Lines, 6-3/10w x 6-1/5d x 2-2/5h

\$39.98

PT-1400 Commercial Handheld Labeler

7 Lines, 6-1/5w x 3-1/5d x 9-2/5h

\$38.90

PT-16R PC-Ready Rechargeable Labeler

5 Lines, 5-1/10w x 2d x 4-6/5

\$39.91

PT-2430 PC-Connectable Label Printer

Meals, snacks and beverages prepared away from home

- Unique channel characteristics:
 - High fragmentation
 - High segmentation
 - Broadly Separated into
 - Commercial
 - Non-Commercial- “On-Site” Feeding- Colleges, Hospitals, Hotels
 - Lack of trade information
 - Little data available; no tracking of product sales
 - Decision makers
 - Distributors attempt to influence, but...
 - The restaurant operator, not the consumer, calls the shots

- Structure & Size
 - Food Service follows a very linear supply chain



- US Foodservice Market Size

Manufacturer Shipments/ Distributor Purchases	Operator Purchases	Consumer Purchases/ Retail Sales Equivalent
\$144 B	\$166 B	\$500 B

This is roughly equal to retail food sales

Technomic, Inc 2009

CHANNEL OVERVIEW

- Unique channel characteristics:
 - Business Categories
 - Business that consume products or Services
 - Government Agencies
 - Institutions
 - Resellers
 - Types of Sellers
 - Big Box – Combination of Retail and B2B Redistributors
 - Independent Dealers
 - Lack of trade information
 - Little category data available
 - Dealers protective of sales information
 - Competition
 - Almost all types of businesses purchases something through the Re-Distributors
 - All independent dealers purchase through both Re-distributors but designate first & second call
 - Dealers purchasing from Club and Warehouse are becoming more prevalent
 - Dealer purchasing categories Include:
 - Jan/ San
 - Cleaning & Breakroom
 - Technology
 - Environmental
 - Sales may comprise:
 - Contract business
 - E-commerce and web
 - Catalog sales
 - Vertical Markets Include:
 - Hospitality
 - Education
 - Healthcare
 - State & Local Government
 - Contractors
 - Military
 - Sales Strategy
 - Solution selling
 - Account programs

- 
- Annual Sales Meetings
 - National, Regional And Account Show Support
 - Various Catalogs And Flyers
 - Email Blasts
 - Distribution Kits
 - Social Media
 - Integrated Marketing Campaigns
 - Virtual Trade Shows
 - Key Supplier Meetings
 - HQ Management
 - Promotional Programs
 - Region, District, Account Manager And End-user Meetings
 - Training
 - Incentive Programs
 - New Item Introductions
 - Inside Sales Team Support



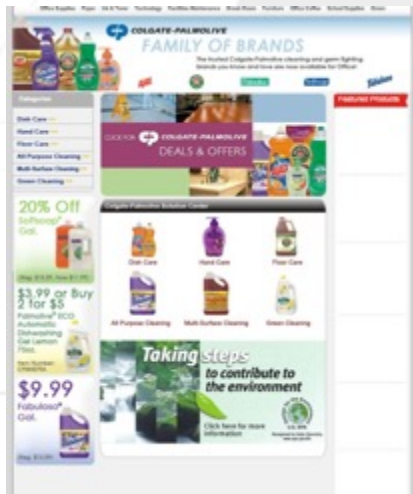
Print, Television, Radio,
Web, Billboards, Mobile

Corporate Identity

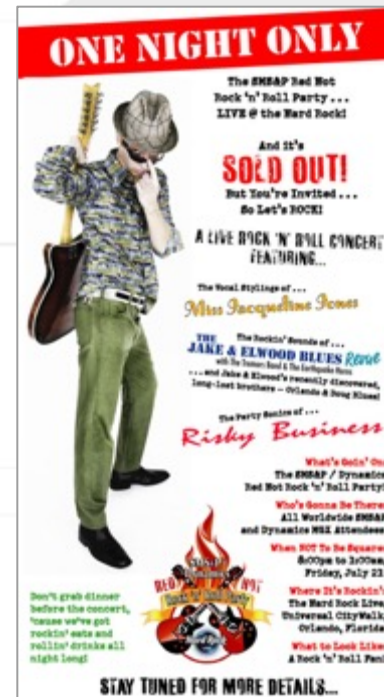


Brand Development, Logo Design,
Business Card & Letterhead Design,
Identity Guidelines

Web Design & Development



Email Marketing



Content Development, Navigational Strategy,
Flash Design, Database Programming,
E-commerce, Ongoing site maintenance

Compass advantage CREATIVE SERVICES

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Marketing Collateral

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The #1 Branded Snack Cracker*

Cheez-It Brand contributed to Cracker Category growth, providing 35% of total growth since 2005. The brand continues to perform well, up 12.8%.*

Cheez-It has the highest buy rate of any major brand in the cracker category.*



Cheez-It vs. Chex Mix Cheddar

Product	Dollar Sales	Dollar Sales	Dollar Sales	Dollar Sales
	Q4 '11	Q4 '10	Q4 '11	Q4 '10
Sweetest Cheez-It Cheddar Cracker	\$14,196,372	\$12,934,372	10.9	
Chex Mix Cheddar Cracker	\$13,324,318	\$9,977,200	9.7	

Source: Nielsen, Q4 ending Sep 30, 2011
*See also Nielsen Q4 ending Sep 30, 2011
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Compass **MARKETING**

Sprinkle Sweetness.

No Calorie Sweetener.
Over 40% share of the Low Calorie Sweetener category.
Available in packets and mini "On-the-go" tubs.
New Splenda® with Fiber.
Extensive marketing support behind the brand (TV, print, PS, etc.).
80 share of advertising dollars.
Unique offers and recipes at Splenda.com.

Why Splenda?

- Nearly 100 million households purchased Splenda® in 2010.
- 1/3 of U.S. adults use Splenda®.
- 28% of all beverages are consumed away from home.
- 73% of "light" Splenda® consumers like Splenda® several times a week.
- Current consumer behavior indicates continued demand.
- 100% of Splenda® users "strongly" agree packets with them.

"Most of the time I enjoy Splenda® in my coffee at parties, and I've used it in my cooking for coffee and there is no Splenda® available. I just don't use the rest!"



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RELY ON COPPER TO GO FOR THE GOLD

Receive a \$25 Gift Card*
With \$100 in total purchases of any Duracell products from January 1 - March 31, 2012.

See store for details and restrictions. *Offer valid on purchases of \$100 or more. *Offer ends 3/31/12.

and ENTER TO WIN A TRIP FOR TWO to the 2012 Olympic Games.



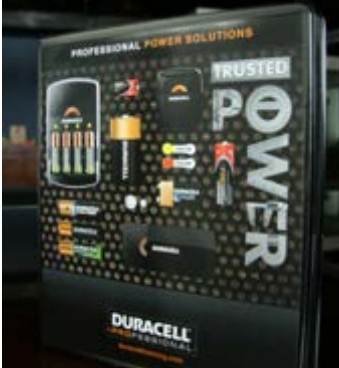
TO RECEIVE YOUR \$25 GIFT CARD BY MAIL:
1. Buy \$100 or more of any Duracell products.
2. Enter DuracellGiftCard.com or call 1-800-455-7376.
3. Receive a \$25 gift card by mail.

TO USE YOUR \$25 GIFT CARD:
1. Use your \$25 gift card at any Duracell store or online at Duracell.com.
2. The \$25 gift card can be used for any Duracell product. *Offer valid on purchases of \$25 or more. *Offer ends 3/31/12.

See store for details and restrictions. *Offer valid on purchases of \$25 or more. *Offer ends 3/31/12.

PROFESSIONAL POWER SOLUTIONS

TRUSTED POWER



DURACELL

Direct Mail

Merry Christmas with M&M's® Brand Chocolate Candies



ACE Hardware
Win a \$200 AMEX gift card to fund an in-store PIZZA PARTY!

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Merry Christmas with M&M's® Brand Chocolate Candies

Win a \$200 AMEX gift card to fund an in-store PIZZA PARTY!

ACE has a FUN and EXCITING new in-store contest just in time for the holiday season featuring America's Favorite Candy - M&M's® Brand Chocolate Candies!

As a Top Performing store, you recently received a wonderful M&M's® Brand Chocolate Candies character display and M&M's® Brand Chocolate Candies to fill him up! This FREE display will not only help DRIVE SALES for your store, but will also provide a FUN way to interact with your employees and create customer excitement this holiday!

The contest is designed to bring out your M&M's® Brand Chocolate Candies character's inner holiday spirit! Use this character in the most unique and creative way for Christmas - decorate him, pose him, include him in your Trim-a-Tree area! The three (3) stores with the most creative and unique displays will be rewarded with a \$200 AMEX gift card to fund an in-store PIZZA PARTY!

Don't be surprised when your customers want to get their pictures taken with your M&M's® Brand Chocolate Candies character dressed like Santa Claus!

ACE buyers will determine winners of the contest. Please e-mail photos of your M&M's® Brand Chocolate Candies Character on display by Friday, November 27th to sprange@acehardware.com. **Winners will be chosen on December 1st.**

Best of luck to your store and to a successful holiday season!

Rob Sprange
Ace Hardware
Dept. 91, Impulse/Promotions
sprange@acehardware.com
830-412-4008



Actual display

Postcards, Sales Letters,
Dimensional Mailers,
Interactive Presentations

Brochures, Sell Sheets, Signs, Posters,
Self-Promotion, Catalogs, Forms,
Invites & Announcements, Flyers & Inserts

Point-of-Purchase



In-Store Concepts, Product Signage/ Flyers, Tear-away Rebates

Package/ Display Design



Tradeshows



Stage Design, Collateral, Sales Meetings,
Networking Events, Product Launches

Event Marketing



Sell Sheets, Deal Sheets, Order Forms,
Signage/ Banners, Video, Booth Design, Swag

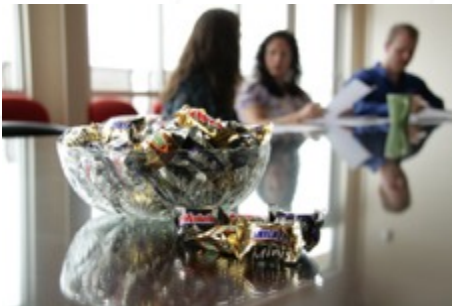
Compass advantage

CREATIVE SERVICES

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Product Photography



Digital High Resolution Images

Video / Audio Production



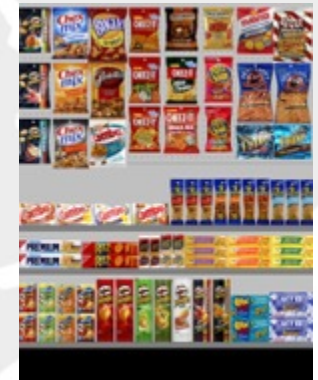
Corporate Presentations, Training,
Image Videos, Commercials

Marketing Strategy



Identifying Target Audience,
Market Research, Competitor Analysis,
Business Naming and Tagline Development

Merchandising Services



Planograms, Product Assortment,
Category Placement, Shelf & Back Tags

Interactive Media



Training Programs, Product Launches, Interactive Catalogs, Corporate Presentations, Social Media

Brand Development, Positioning and Consulting



Identifying Core Values, Creating Positive Emotional Attachment, Maintaining consistent message across all mediums, etc.



Leveraging the best of Sales,
Marketing and Insights to accelerate
results in Alternate and Specialty
Channels.



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TRANSPORTATION CLASS OF TRADE

(5,732 outlets)

DNC
Delaware North Companies

ONSITE NEWS

Hudson News

H  **HDS Retail**
North America

HMS
OST

TRAVEL TRADERS, LLC


THE PARADIES SHOPS

.PING **GREAT COMPANIES**
DO GREAT THINGS

TRANSPORTATION CLASS OF TRADE

PROFILE: HUDSON NEWS

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HELPING GREAT COMPANIES DO GREAT THINGS

- Hudson manages a variety stores that anticipate and fulfill the needs of travelers while complementing the design and culture of the areas in which they are located.
- Headquarters:
 - East Rutherford, NJ
- Size:
 - Over 550 newsstands, bookstores, cafes and specialty in 69 airports and transportation terminals throughout the United States and Canada.
- Sales: 201.7M (North America 2008)
- Promotions:
 - Quarterly Dump Bin
 - Cash Wrap Program
 - Sampling
 - Polling Cart Displays in 150 Stores-Items featured on shelves and 2 side banners
 - Ads on shopping bags-usually periodicals
 - Plasma screen ads.
 - Marquis and Vertical Banner Program
 - Marquis –42” W x 11” H –150 locations nationally
 - Vertical –11” W x 42” –35 locations nationally
 - Agreements last 3 years
 - Shippers/ Clip Strips Trade Show Tie-in
 - In-store scanning
 - Yearly Tradeshow

Hudson News



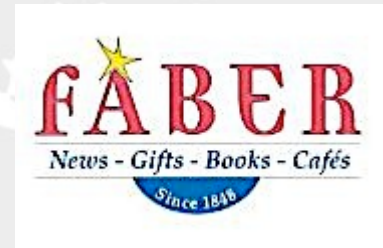
TRANSPORTATION CLASS OF TRADE

PROFILE: FABER, COE & GREGG, INC



HELPING GREAT COMPANIES DO GREAT THINGS

- News dealers and newsstands
- Headquarters:
 - Secaucus, NJ
- Size:
 - 57 locations in the Northeast and South U.S. including airports, train stations, Hotels, and Office Buildings
- Sales: 28.2M
- Brands:
 - Faber News Now
 - Dunkin Donuts
 - Hugo Boss
 - Taxco Sterling
 - Rosetta Stone
- Distribution
 - Century Distributors
 - Allen Brothers
 - Silverman
 - Auburn Distributors



Paradies Profile

- Headquarters:
 - Atlanta, Georgia
 - Size:
 - Currently at 450 locations
 - Serves more than a half billion customers each year
 - Over 24 different store banners
-
- Primary Location Sites:
 - Airports and Hotels
-
- Promotional Programs:
 - Press Express
 - Self Serve Essentials (Water & Paper)
 - Pink Promotion - October Breast Cancer Month
 - Cash Wrap Program
-
- Miscellaneous:
 - Snack POG - Fall 2009
 - 32 New stores opening in 2009





- HMSHost Profile
- Headquarters: Bethesda, Maryland
- Size:
- Currently @250 store locations and purchasing for another 350 locations within travel plazas that are under their Food & Beverage division
- Z Markets –larger convenience store format –they will have 12 locations by the end of '08
- Volume @\$25,000,000.
- Travel Plazas and Airports
- Cost of new items:
- \$100.00 per sku
- Promotional Programs:
- There are 13 Promotional Periods per year
- Cash Wrap at register = \$17,000 for a 30 day period –lift is between 250/ 400%
- Candy Wall –cost same as above with lift being between 175/ 350%
- Snack Wall –cost same as above with lift being between 175/ 350%
- HBC Fixture –cost same as above with lift being between 125/ 150%
- Travel Information Network (TIN) –cost is \$28,000 for 30 day period on 68 screens for 180,000 GRP's using 15 second spots
- Misc:
- Clips Strips –not used by HOST but will buy them if there is an accompanying promotional allowance –will remove from clip strips and merchandise as needed
- In Store Scanning –currently@75%of their locations are scanning with a target of 100%by end of 2009
- SAP –currently implementing this program
- Data –will consider selling or sharing category data on an individual basis with a manufacturer –with signed confidentiality agreement



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COLLEGE BOOKSTORE CLASS OF TRADE

BOOKS·A·MILLION

(10,589 outlets)

BARNES & NOBLE
COLLEGE BOOKSELLERS



Nebraska
Book Company

 **follett**
HIGHER EDUCATION GROUP

HELPING **GREAT COMPANIES**
DO **GREAT THINGS**

Barnes & Noble College Bookstores is the scholastic sister company of Barnes & Noble (B&N), the US's largest bookseller.

•Headquarters:

- Basking Ridge, NJ
- 635 Locations in 44 states (500 contain convenience products)
- Average 10,000 – 20,000 Square feet

•Target Demographic: 4.3 Million students (primarily live on campus), and staff/ family

•35 years managing on campus college bookstores

•Promotions:

- Value endcap program
- Shipper program – Seasonal/ promotional program in 150 stores (400 – 500 stores during “rush”) various merchandising and promotional activities
- Cash Wrap – “on the go” and impulse items merchandised next to store check outs. Cost of program is \$8,000 per item in 400 stores for 12 months.
- Sampling programs – On campus samples of new and priority items
- Marketing Opportunities – Barnes and Noble Partnership Marketing group can reach students with your message and
– Steve Schubert
- Yearly tradeshow

BARNES & NOBLE
COLLEGE BOOKSELLERS



- Headquarters:
 - Oak Brook, IL
 - Manages over 800 college bookstores in North America
- Promotions:
 - fully-integrated online and in-store marketing program
 - supported by advertising and visual merchandising
 - promotional programs tailored to alumni groups
 - Period promotions tied to start of classes, homecoming, holidays etc.
 - Cultural promotions tied to African-American History Month, Women's History Month, etc.



- Nebraska Books Profile



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HOME IMPROVEMENT/ INDEPENDENT HARDWARE FARM AND FLEET CLASS OF TRADE

LOWE'S
Let's Build Something Together[®]



(37,413 Outlets)

MENARDS[®]

ACE
The helpful place.[®]

84 LUMBER

True Value[®]

TSC TRACTOR SUPPLY CO.

**Do it
Best**[®]

HELPING GREAT COMPANIES
DO GREAT THINGS

PROFILE: THE HOME DEPOT

HELPING GREAT COMPANIES DO GREAT THINGS

- Headquarters:
 - Atlanta, GA
- Size:
 - 2,233 worldwide, 1,971 U.S.
- Sales: \$71,288.0M (2009)
- Promotions:
 - Circular
 - Free How-To Clinics and Reference Books
 - Do-It-Herself Workshops
 - Kids Workshops
 - Special Services for Professional Customers
 - Commercial credit accounts



- Headquarters:
 - Eau Claire, WI
- Size:
 - 100 stores throughout 9 states on the east coast
- Sales: \$7,800.0M (Estimated) (2008)
- Promotions:
 - Sales Fliers available in electronic and print form
 - Menards is a NASCAR sponsor
 - Menards is EDLP, all promotions are funded by Menards.

MENARDS



- Headquarters:
- Mooresville, NC
- Size:
- 1,638 U.S. Stores
- Sales: \$48,230.0M (2009)
- Promotions:
- Lowe's Credit Cards
- Free email newsletters
- Weekly local ads
- LowesCreativeIdeas.com, how-to video resource
- Targeted direct mail efforts





PEPBOYS
AUTO
 Parts, Service and So Much More

Advance
Auto Parts
 We're ready in Advance.

Compass **MARKETING**
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Federated
Auto
Parts
 PROFESSIONALS

AUTOMOTIVE CLASS OF TRADE

(16,650 Outlets)

CARQUEST

O'Reilly **AUTO PARTS.**
 PROFESSIONAL PARTS PEOPLE
CSKAUTO

AutoZone

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 DO **GREAT THINGS**

Headquarters

- Memphis, TN

Size

- #1 auto parts retailer in America
- 4,813 Stores (4,534 in U.S, 279 in Mexico)
- Stores typically range from 6,500 –8,000 sq. ft.
- Over 6 million customers per week
- 70,000 employees

Sales

- \$8.60B (2012)

Customer Demographics

- 66%Male, 34%Female
- 34%(18 to 34), 30%(35 to 49)

Promotions

- Clip Strip Program
- Tie-in Promotions
- In-store Circular



AUTOMOTIVE CLASS OF TRADE

ADVANCE AUTO PARTS

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Headquarters

- Roanoke, VA

Size

- 3,662 Stores (39 States, Puerto Rico, Virgin Islands)
- 55,000 Employees

Sales

- \$6.21B (2012)

Promotions

- Weekly Ad (By Location)
- Advance Auto Parts Newsletter
- Advertising plan built around television and radio supported by print and in-store signage
- TV advertising is a combination of national and regional media in both sports and entertainment programming.
- Radio advertising airs during peak drive times.
- Sponsor sporting events, racing teams and other events at all levels in a grass-roots effort to positively impact individual communities, including Hispanic and other ethnic communities, to create awareness and drive traffic for our stores.



AUTOMOTIVE CLASS OF TRADE

PEP BOYS

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Headquarters

- Philadelphia, PA

Size

- 738 Stores (35 States and Puerto Rico)
- 19,123 Employees

Sales

- \$2.06B (2012)

Promotions





'FORE' SUPPLY CO.

SPORTING GOODS CLASS OF TRADE



(21,378 Outlets)



HELPING GREAT COMPANIES
DO GREAT THINGS

SPORTING GOODS CLASS OF TRADE

PROFILE: DICK'S SPORTING GOODS



- Headquarters:
 - Pittsburgh, PA
- Size:
 - 384 Stores in 39 states
 - 27,600 employees (2009)
 - Locate stores in primary retail centers with an emphasis on co-tenants including major discount retailers or specialty retailers from other categories
 - Primary prototype store is approximately 50,000 square feet
- Sales: \$4.13 Billion (2009)
- Customer Demographics:
 - 53% Male Age: 12-17 (20%), 18-34 (25%), 35-49 (27%), 50+ (17%)
- Promotions:
 - Game-On Circular
 - Email Alerts
 - Catalogs
 - Interactive Store Events



SPORTING GOODS CLASS OF TRADE

PROFILE: BIG 5 SPORTING GOODS

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- Headquarters:
 - El Segundo, California
- Size:
 - 384 stores mostly in the western U.S.
- Sales: \$ 896.81M (2010)
- Promotions:
 - Run Ads every week (sometimes 2x per week)
 - Circulars up to 2x per week.
 - Email marketing, exclusive coupons



- Headquarters:
 - Katy, TX
- Size:
 - 121 stores throughout 11 southern states
- Sales: \$1,840 million (2006)
- Promotions:
 - Weekly Ad by location
 - In store catalogs
 - Academy Sports credit card





- Headquarters:
- Englewood, CO
- Size:
- Over 450 nationwide
- Sales: \$2,980.0M (2008)
- Promotions:
- Coaches Club, savings and special offers for teams





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E-COMMERCE CLASS OF TRADE

amazon.com[®]

drugstore.com[™]
the uncommon drugstore

HELPING **GREAT COMPANIES**
DO **GREAT THINGS**

E-COMMERCE CLASS OF TRADE

PROFILE: AMAZON.COM

amazon.com[®]

- World's biggest online retailer
- 42 product categories
- #1 in customer service
- Most trusted brand in U.S.
- Sales: 2010 Web Sales \$32.2B (40% revenue growth in 2010)
- Web Statistics
 - 114M active customers worldwide
 - Largest online retail customer base and growing quickly
 - Average Ticket \$185
 - 75 Million monthly unique visitors
 - #5 most visited site in the U.S.
- Target Demographic
 - Site attracts 48% ages 25-44,
 - More educated crowd. 46% Male / 54% Female
- Entire selection of products including all pack sizes
- Integrated sales and marketing solutions with Adzinia in house ad agency and network
- Amazon customers are driven to purchase based on price, selection and convenience
- Top 5 E-Commerce Sites:
 1. Amazon.com
 2. Staples.com
 3. Dell.com
 4. Apple.com
 5. OfficeDepot.com



- Drugstore.com, inc. is a leading online retailer of health, beauty, clinical skincare, vision, and pharmacy products.
- Sales: 2010 web sales \$456.51M
- Web Statistics
 - 9 Million monthly visits
 - 5 Million unique visitors
 - Average ticket \$66
- Target Demographic:
 - Male –36%/ Female –64%
 - 25%ages 35-44
- Promotions:
 - Monthly email campaigns
 - Coupon Availability
 - Certified by the National Association of Boards of Pharmacy (NABP) as a Verified Internet Pharmacy Practice Site (VIPPS)
- Walgreens Acquisition
 - In early 2011, Walgreens agreed to purchase drugstore.com for \$429M
 - Acquisition makes drugstore.com a part of the US largest drug retailer
 - Signals Walgreens interest to take a leadership position in e-commerce
 - Walgreens expects the deal to be closed by mid-2011



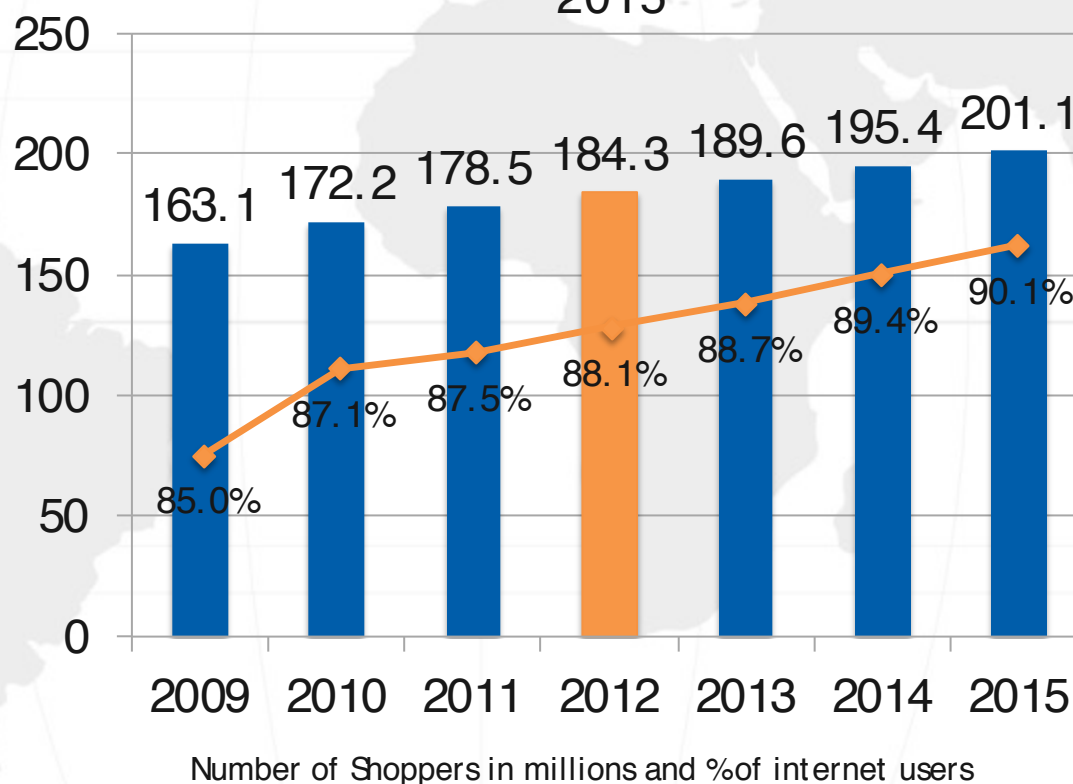
drugstore.com
the uncommon drugstore

184 Million Online Shoppers

10% of US retail sales are now online

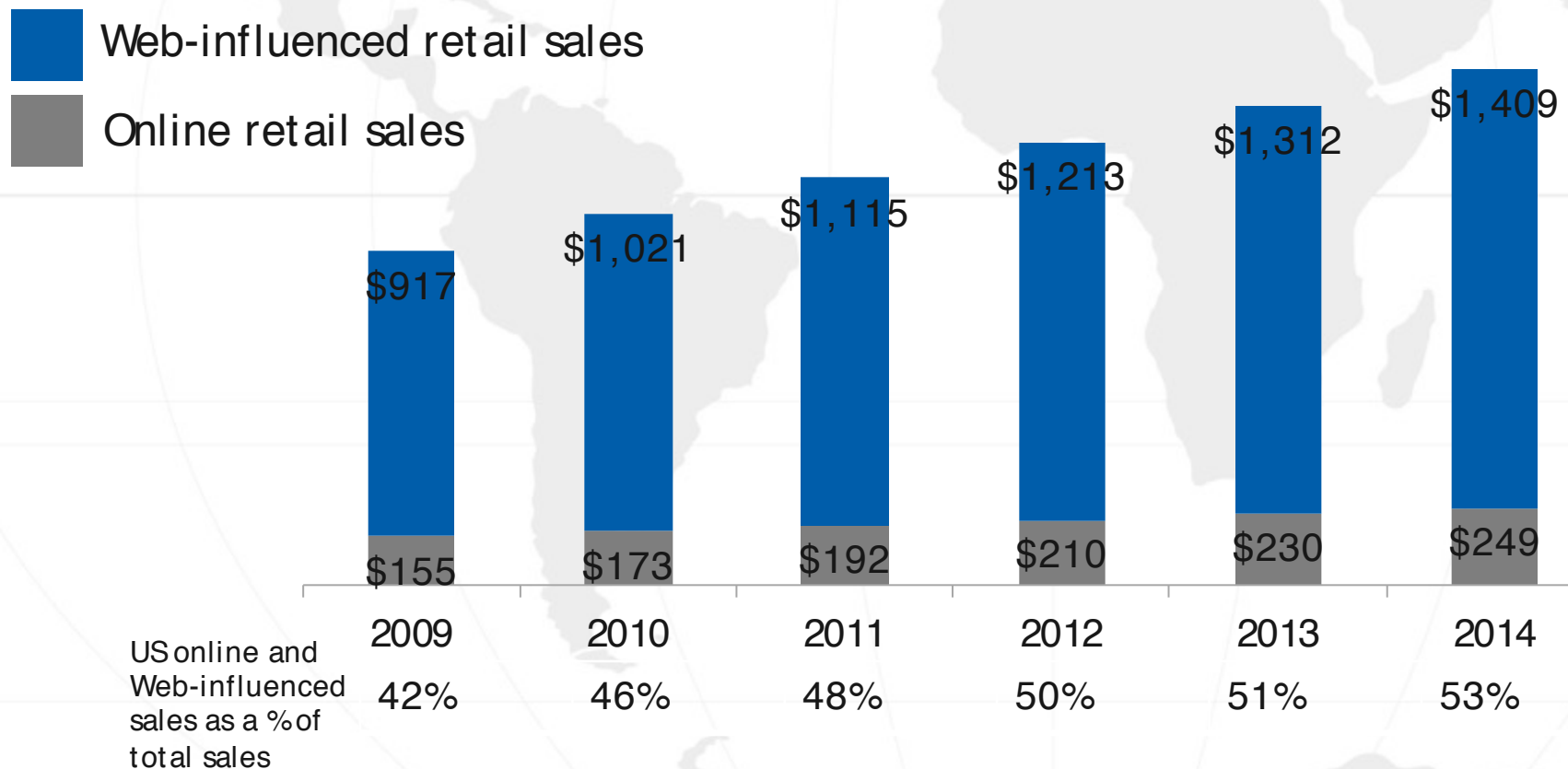
The number of consumers researching or shopping online is steadily growing and will surpass 200 million by 2015

U.S. consumers shopping online, 2009-2015



Source: eMarketer, March 2011

- Online interactions and research influences more than half of total U.S. retail sales



Source: Forrester Research: "US Online Retail Forecast, 2010-2015," November 2010

- Internet will influence 50% of retail sales in 2012
- 29% increase on in-store sales when consumers are exposed to online advertising
- Internet advertising has surpassed newspaper ad revenues
 - Google brings in more ad revenue than all US print combined



“Every dollar spent online influences \$5.77 spent in the store over the next 10 days”

Peter Sachse, CMO of Macy's and CEO of macys.com

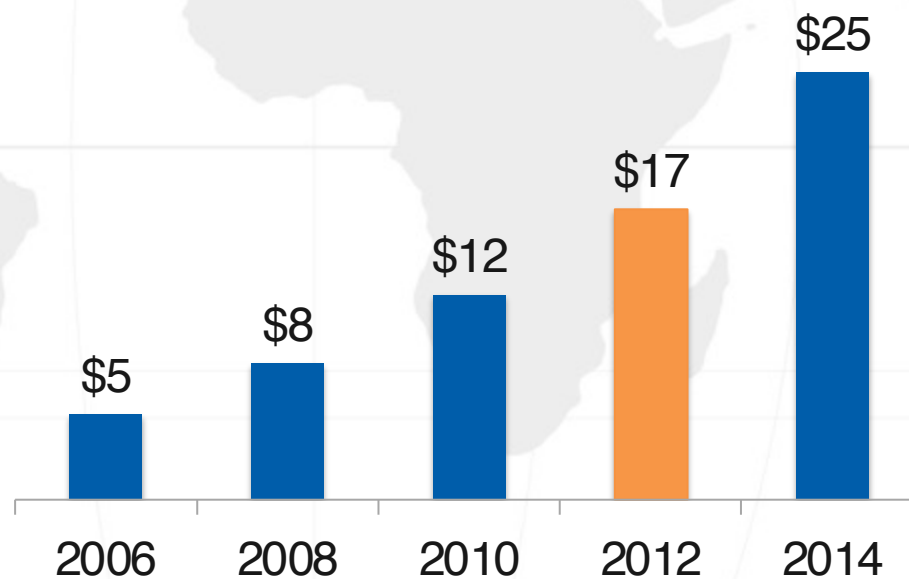
Source: Forrester Research, comScore, Statista

CPG Purchases Online

- 2012 online CPG purchases: \$17 billion
- 60% used the internet for grocery shopping research
- 49% of internet users have purchased groceries online

U.S. Online CPG Sales (\$ Billions)

2006 -2010 CAGR: 20%- 25% 2011 -2014 CAGR: 25%- 30%

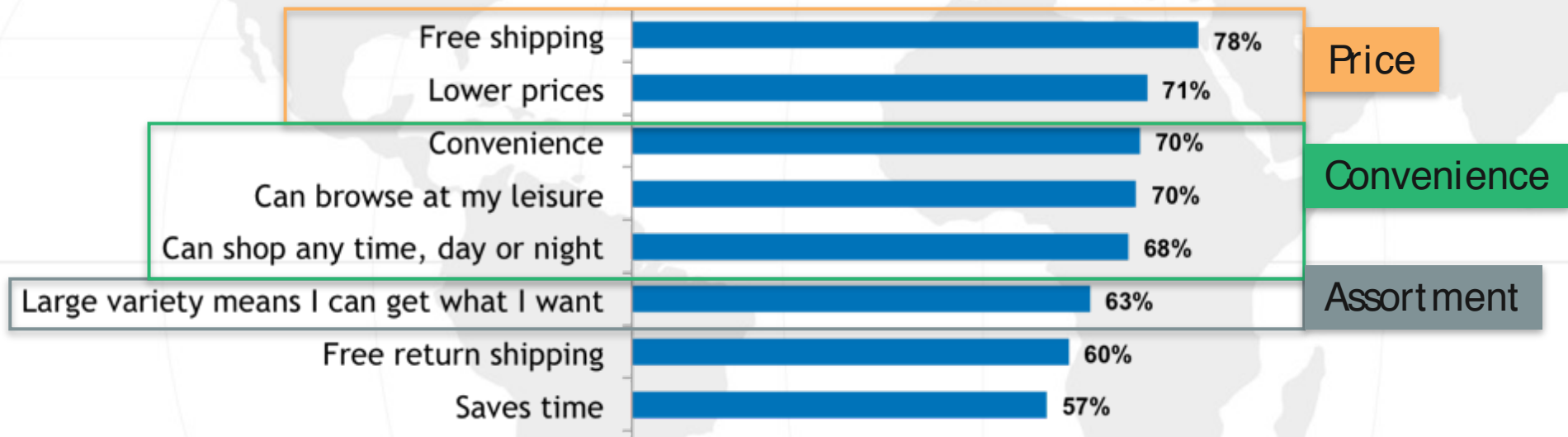


Source: comScore: State of the US Online Retail Economy in Q1 2011, Nielsen 8/ 12

THREE CORE DRIVERS FOR ONLINE PURCHASING

Reasons for Shopping Online

(Factors that Are “Very Important” – ShopperScape, July 2011)



Pricing critical, but shoppers are looking to save both time & money by shopping online

Source: Kantar Retail analysis, Kantar Retail ShopperScape®, July 2011, Compete – Fall 2011

Average Transaction Size

Food & Beverage

HBA

~\$80
Online

~\$30
Offline

~\$30
Online

~\$10
Offline

Source: Nielsen



“In global e-commerce, we will not just be competing. We will play to win.”

“With our stores and low prices, we can really take advantage of mobile technology and this era of price transparency. We can combine our stores, our systems, and our logistics expertise into one continuous channel to drive growth and serve the Next Generation Customer around the world.”

Mike Duke
President & CEO - Walmart Stores Inc.
June 3, 2011 Annual Shareholders Meeting



“We do about a half billion dollars a year on the internet today, and we think the growth of the business can be multiples of 10, not index points”

Bob McDonald
Chairman, President & CEO
Procter & Gamble

- Shopper Communication
 - Unparalleled convergence of sales, marketing and advertising
 - Ability to target consumers demographically and behaviorally
 - Ability to communicate with shoppers at all points along path to purchase
 - Create interruption points to drive impulse
 - Substantial ability to show detailed product description, attributes, images and video, etc.
 - Recommendation engines deliver highly relevant content that consumers want to receive
 - Going beyond opt in—permission based marketing
- Logistics
 - Open 24/7
 - Unlimited selection
 - No slotting fees
 - No display rack and shipper expense
 - Free Shipping (nearly 50% purchases)
 - Instantaneous (one click) check-out
 - Hassel free checkout—no lines and stored credit information
 - Branded packaging opportunities--unboxing moments
 - Pre-purchase commitments



- Dual Marketing and Sales Environment
 - New Amazon audience extension program
 - Buy now advertising across 40,000 sites
 - Ability to achieve brand goals and drive instant sales
 - Adjacent reviews impacting purchasing decisions
 - Amazon allows brands to comment on reviews and engage in dialog
 - Vine program allows reviews to populate before product launch
 - Fast growing- 15%YOY (3x traditional); 25%for CPG
 - Essential stop on path to purchase influencing 50%all retail sales
 - Multichannel partnerships w/ FDM customers- Walmart, Sam's, Costco, etc.
 - Structural and long-term advantages to those that invest early
 - Real-time market basket, category sales, shopper insights and consumer data
 - Dynamic merchandizing providing optimal consumer benefit



E-COMMERCE

TARGETS

Compass⁺ MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS



amazon.com | E-RETAILER PROFILE

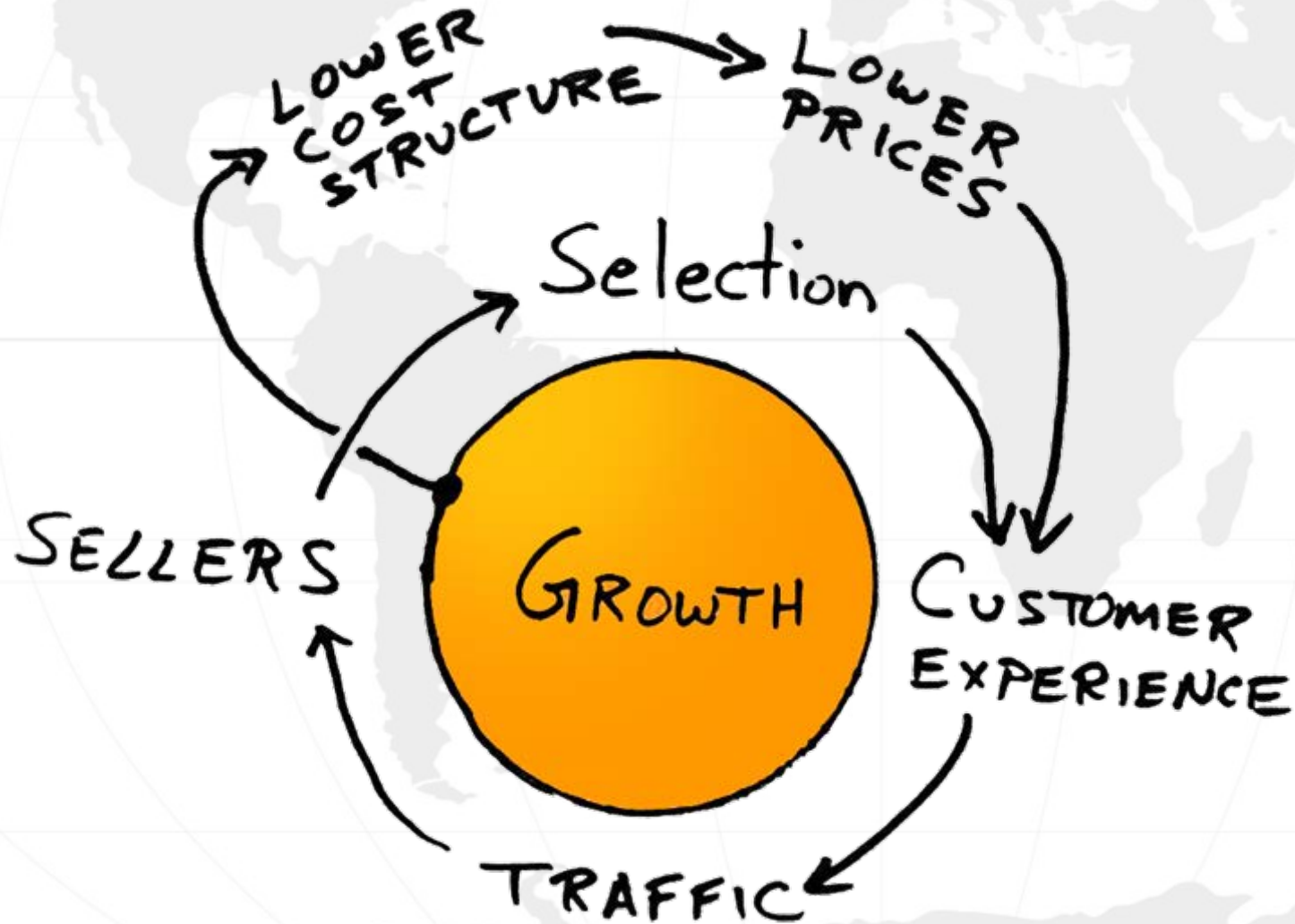
HELPING **GREAT COMPANIES**
DO **GREAT THINGS**

“ If it has a UPC code,
Amazon will beat
you.”

~Anonymous competitor

Source: Chris Dixon's Blog

The Amazon Virtuous Cycle



- World's top e-tailer
 - \$61B Revenue (2012)
 - 7x bigger than #2 ecommerce site Staples.com
 - 27% revenue growth in 2012
 - Fortune #56 in 2012
 - Worldwide active customer accounts exceeded 200 million +22% YoY
- 4% conversion rate
 - 91.6 million unique daily shoppers in US
- World's top product research hub
 - 30% of all product searches start at Amazon in US
- Amazon derives 33% of listings from 2,000,000 affiliate marketing reps called "Amazon Associates" and third-party sellers

Source: Internet Retailer, Amazon.com Investor Relations, Millward Brown, comscore, Compete, Kantar Retail

THIRD PARTIES

WHAT IS A THIRD PARTY AND WHY DOES IT MATTER?

Shipped and Sold by Amazon.com:



Shipped and Sold by 3rd Party Seller:



Snickers Minis - 50 oz
by [Snickers](#)
[Be the first to review this item](#) | [Like](#) (0)
List Price: ~~\$29.99~~
Price: **\$17.99** (\$0.36 / oz)
You Save: **\$12.00** (40%)
In Stock.
Ships from and sold by [The Natural Health Shoppe](#)



Negative reviews and
poor product page leads
to negative brand
impression

4 of 4 people found the following review helpful:

☆☆☆☆ **Crushed peanuts**, June 23, 2011

By [retailgirlchang](#) - [See all my reviews](#)

Amazon Verified Purchase (What's this?)

This review is from: **M & M's Peanut 56 Ounce Bag (Misc.)**

I love peanut M&M's and buy it all the time. I thought that I could just buy a big bag so I didn't run out but it was not worth it. It's more expensive (and I don't have to pay for shipping b/c I'm Prime), which is okay with b/c it's hard for me to get to the store and I wanted it fast. The 1 star rating is b/c 25% of the candy came crushed and left a mess when I opened the bag. I think that there were melting issues and with the weight, some pieces just cracked. I will not buy again.

Help other customers find the most helpful reviews

Was this review helpful to you? [Yes](#) [No](#)

[Report abuse](#) | [Permalink](#)

[Comment](#)

Number of Amazon shoppers in consumables has grown **82% YOY**

2%

September, 2010

3.6%

March, 2011

4%

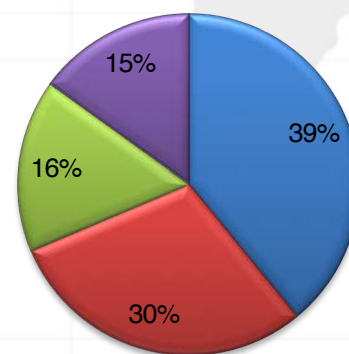
September 2011

10%

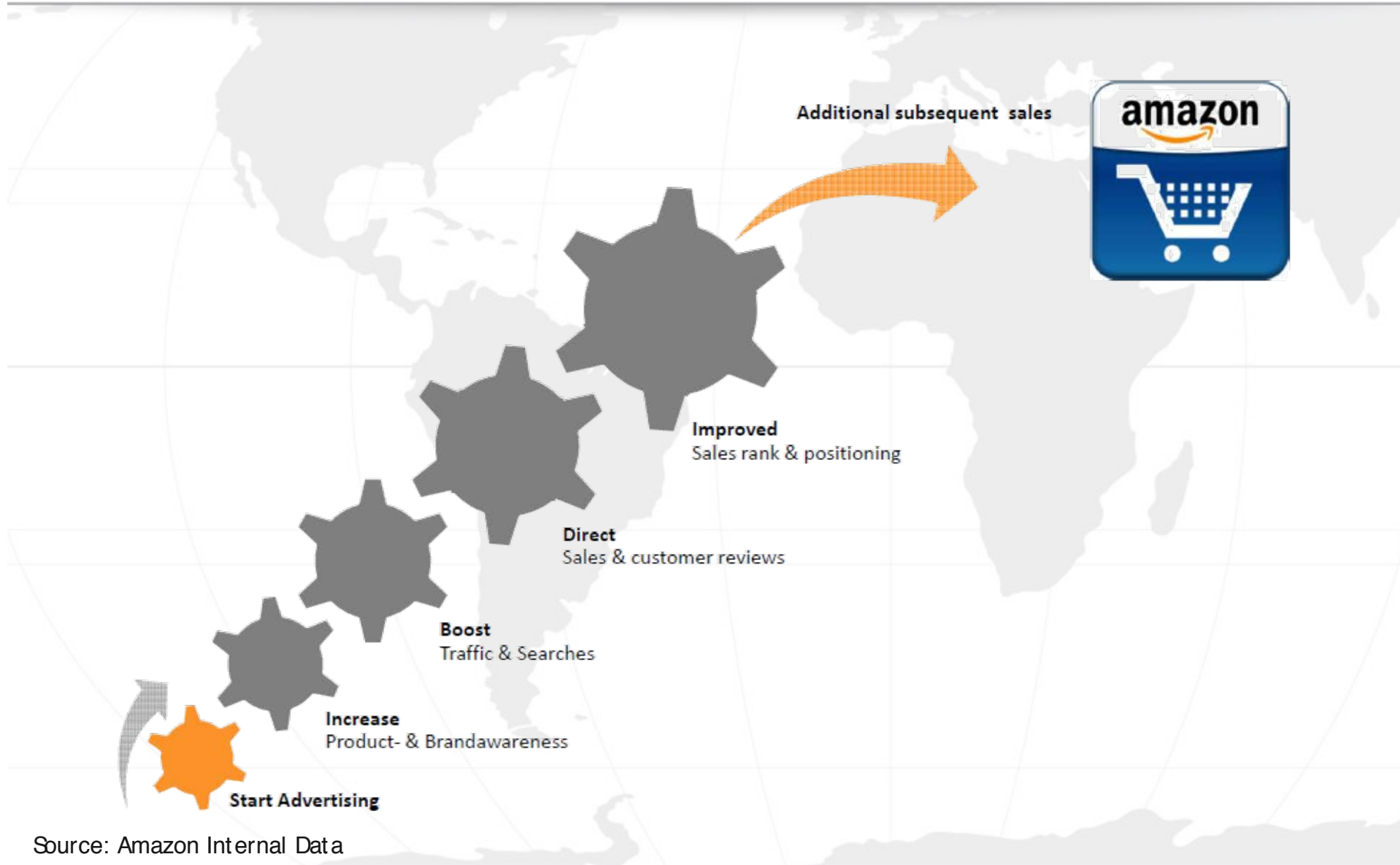
December 2012

CPG Customer %By Product Group

■ Health & Personal Care ■ Beauty ■ Grocery ■ Baby



Source: Amazon Internal Data, US only –customers who made at least one purchase in Personal & Health Care, Beauty or Baby (CPG). US only –customers who made at least one purchase

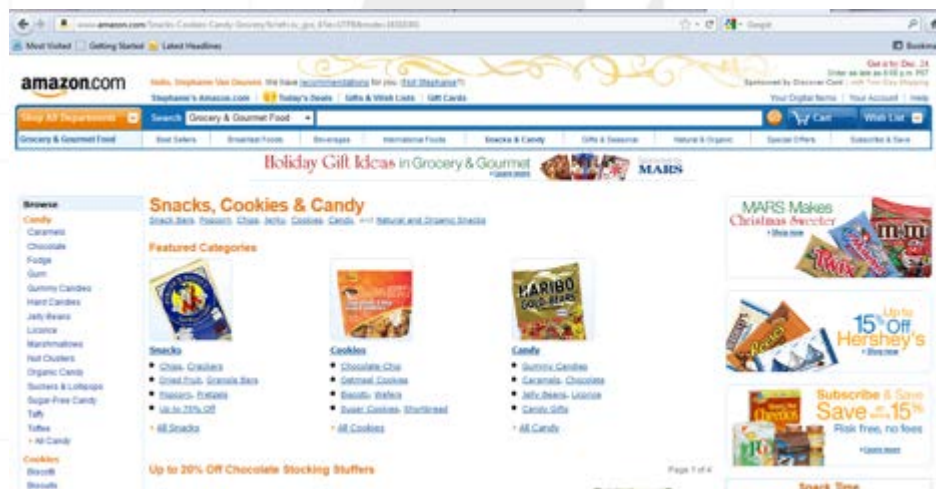


Online Shelf

- Convergence of sales and marketing –earned media
- Rich content, A+ content –can by dynamic across multiple retailers
- Unlimited shelf space, but instead of slotting fees there are structural costs—recommendation engines, product placements, search engines
 - 6%of revenue back into marketing and rec engines



A+ Detail Pages



Product Placement on the Virtual Shelf

Source: Amazon Internal Data

Multi-Disciplined Approach to Success

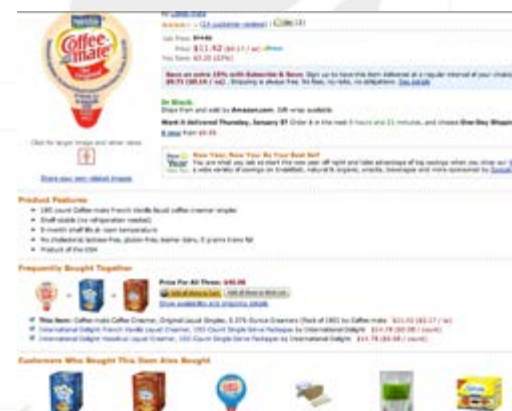
- Targeting based on behavior, not just demographics
- Engage consumers when they are in-market
- Off-line impact of online effort
- Ability to take consumer out of decision making process--SNS
- Amazon Media Group Advertising Network
- SEO and paid search



Subscribe & Save



Vendor Coupons



Recommendation Engines

Subscribe & Save attracts Amazon's best customers

- SnS customers are some of Amazon's most **valuable** customers
 - 7 X spending of an average Amazon.com customer
 - 40 X consumables spending of an average Amazon.com customer
- SnS customers are some of Amazon's most **frequent** shoppers
 - 5 X frequency of an average Amazon.com customer

WINNING PROFILE | amazon.com[®]

COMPETING IN A NEW RETAIL CHANNEL

Compass[®] MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS

amazon.com
Patrick's Amazon.com Today's Deals Gift Cards Help

Search Grocery & Gourmet Food yummy earth

YummyEarth Organic Lollipops, Assorted Flavors (15 Count), 3-Ounce Pouches (Pack of 6)
by YummyEarth
Nutrition Facts | ★★★★★ (18 customer reviews) | Like (1)

Price: \$11.37 (\$0.63 / oz) Prime
In Stock.
Ships from and sold by Amazon.com. Gift-wrap available.

- Pack of 6, each pouch 15 counts with 3 ounce (total of 270 ounce)
- Certified organic
- Contains assorted flavors
- Kosher certified

Pay only \$10.80 (\$0.60 / oz) and never run out with Subscribe & Save. Save 5% when you subscribe to regular deliveries of this item. Save 15% on your entire delivery when you subscribe to 5 or more items that arrive in the same month. No commitments, no obligations, and shipping is FREE. [Learn more](#)

11 new from \$11.37

Share your own customer images

Often Bought Together

Price for both: \$23.87
[Add both to Cart](#) [Add both to Wish List](#)
[Show availability and shipping details](#)

Quantity: 1

One-time delivery \$11.37 (\$0.63/oz)

Subscribe & Save: Save 5% \$10.80 (\$0.60/oz) [Details](#)

Delivery every 3 months (Most common)

[Add to your cart](#)

[Subscribe & Save delivery: Mar. 19](#) [Details](#)

[Add to Cart](#)

or 1-Click Checkout

Buy now with 1-Click

Order within 12hr 25min

Get it: Wed +3.99 Thu Free

Ship to: Patrick Miller-ANH

☐ This will be a gift

[Add to Wish List](#)

amazon.com

Subscribe & Save

Subscribe & Save

Save up to 15%
on your monthly Subscribe & Save delivery when you receive 5 or more subscriptions in the same month

[Learn more](#)

Keep Your Pantry Stocked

Baby Food

Breakfast Foods

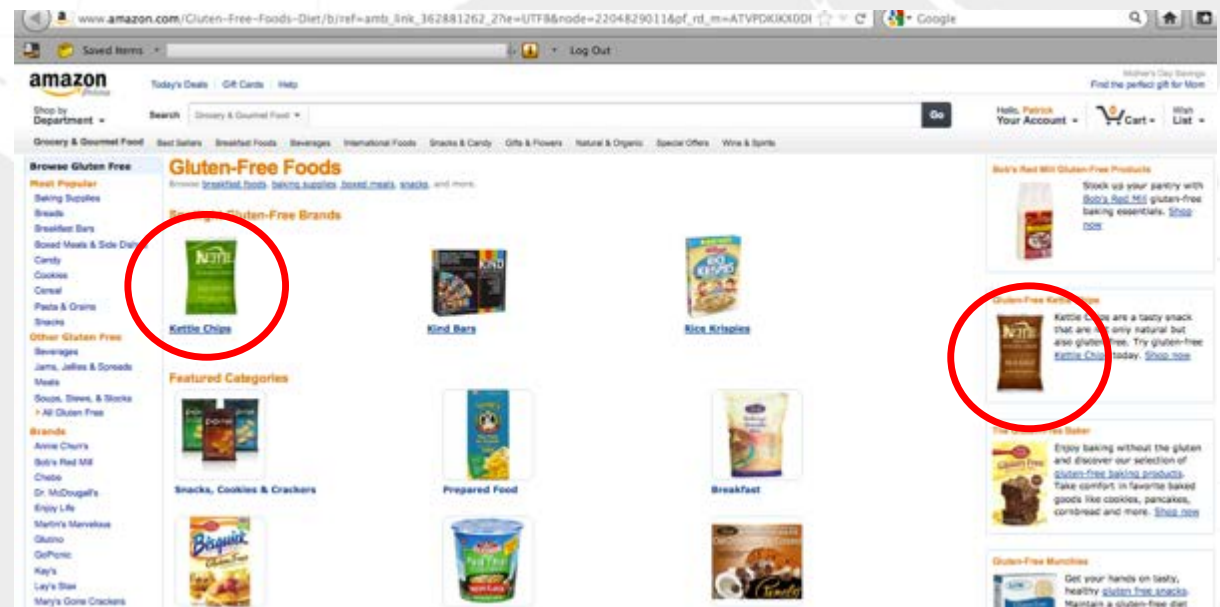
Snacks

Tea

Maintain Your Beauty Regimen

Best Practices

- Structural and long term advantages to those that invest early
- Appropriately fund unique opportunities
- Leverage investments to influence sales offline
- Merchandising Matters: 13% lift in COGS post merch implementation



“Gluten Free” is second most searched term in Amazon Grocery. Added SEO terms to Kettle and participated in Gluten Free Month promotion. Sales are 3x per month higher today than when Compass was first engaged 10 months ago.

Before:

Customer Images for: Kettle Chips, Sea Salt, 2-Ounce Bags (Pack of 24)



Sort by: Highest rated | Most recently added

This image

Like it? 6 of 8 people did.
1 of 7 Report abuse

Uploaded by DJ 02 "djur" "djur" (Oregon)
Uploaded on 11/3/10

Product details

Kettle Chips, Sea Salt, 2-Ounce Bags (Pack of 24) by Kettle

★ ★ ★ ★ ★ (162)

List Price: \$29.91

In Stock

Add to shopping cart

Add to Wish List

3 used & now from \$29.91

Share Your Images

Help others by adding images related to



I was first alerted to leaking packages when I took this box out of the outer Amazon packing box which had no holes in it.



Little mouse had a feast here! Amazon gladly refunded my money.



Every single bag had mouse nibble holes in them or teeth marks where the little guy got a tough bag to open.

After:



Click for larger image and other views



Share your own related images

Kettle Chips

by Kettle

Nutrition Facts | ★ ★ ★ ★ ★ (162 customer reviews) | Like (5)

List Price: \$29.76

Price: \$22.65 (\$0.47 / oz) Prime

You Save: \$7.11 (24%)

Flavor: Sea Salt

Sea Salt

Backyard Barbecue

Honey Dijon

New York Cheddar

Sea Salt & Vinegar

Sour Cream, Onion & Chive

Spicy Thai

Unsalted

Size: 2-Ounce Bags (Pack of 24)

2-Ounce Bags (Pack of 24)

5-Ounce Bags (Pack of 15)

9-Ounce Bags (Pack of 12)

Save an extra 15% with Subscribe & Save: Sign up to have this item delivered at a regular interval of your choice, and the current price drops to \$19.25 (\$0.40 / oz). Shipping is always free. No fees, no risks, no obligations. [See details](#)

Add-on Program

- Compass partnered with Amazon to launch Add-on Store
- 30% of top 50 SKUs were Compass
- First successful movement of eaches on the web
- Increased velocity and right sizing

amazon.com

Patrick's Amazon.com Today's Deals Gift Cards Help

Shop by Department - Search Snacks - Go

Grocery & Gourmet Food Best Sellers Breakfast Foods Beverages International Foods Snacks & Candy Gifts & Flowers Natural & Organic Special Offers Wine & Spirits

Department: Grocery & Gourmet Food

Snack Food

- Chips (2)
- Crackers (14)
- Fruit Leather (4)
- Party Mix (61)
- Popcorn (3)
- Puffed Snacks (3)
- Trail Mix (1)

Specialty

- Gluten-Free (24)
- Low-Fat (1)
- Natural (3)
- Organic (4)
- Sugar-Free (1)

Amazon Prime

- Prime Eligible

Brand

- Happy Munchies (1)
- Happy Times (1)
- Flavor Ice (1)
- Pop Secret (3)
- Diamond (18)
- Stonewall Kitchen (8)
- Hi I'm Skinny Sticks (4)
- See more...

Avg. Customer Review

★★★★★ & Up (7)

Grocery & Gourmet Food > Snack Food > Advanced Search

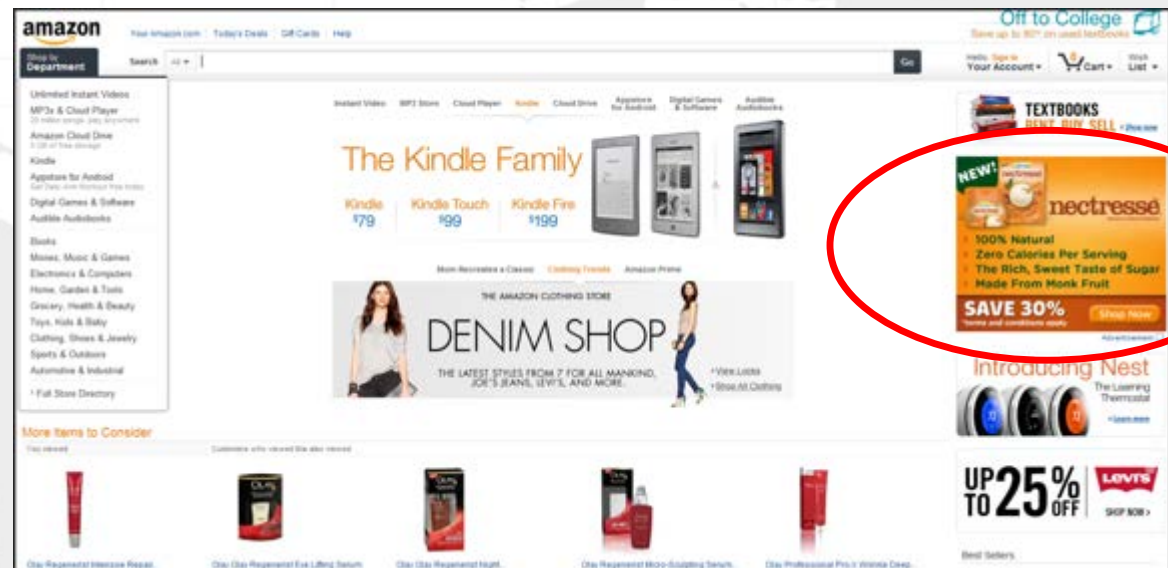
Showing 1 - 24 of 91 Results

Sort by Popularity

- Happy Munchies Apple and Kale Puffed Corn Snacks, 1.4-Ounce
\$3.45 [Add-on item](#)
Add it to a qualifying order within 8 hours to get it by Monday, Jun 18
Show only Happy Munchies items
- Happy Times Crazy Crunchies, Freeze-Dried Carrot Apple Bits, 1.1-Ounce Package
\$5.23 [Add-on item](#)
Add it to a qualifying order within 7 hours to get it by Monday, Jun 18
Show only Happy Times items
- Flavor Ice Tropical Flavors, 100-Count
\$9.84 \$7.57 [Add-on item](#)
Add it to a qualifying order within 4 hours to get it by Monday, Jun 18
Show only Flavor Ice items
- Pop-Secret Fat Free Kettle Popcorn, 4-Ounce
\$3.34 [Add-on item](#)
Add it to a qualifying order within 7 hours to get it by Monday, Jun 18
Show only Pop Secret items
- Diamond Sliced Almonds, 10-Ounce
\$4.99 \$4.45 [Add-on item](#)
Add it to a qualifying order within 7 hours to get it by Monday, Jun 18
Show only Diamond items
- Diamond Chopped Pecans, 4-Ounce
\$4.46 \$3.42 [Add-on item](#)
Add it to a qualifying order within 7 hours to get it by Monday, Jun 18
Show only Diamond items

Nectresse Product Launch

- Vine preload
- AMG Campaign to drive awareness
 - 30% of AMG clicks read all reviews
- Combat Google problem, target right people
- Same CTR as NYNY and 1.6x CPG average
- Cannibalization analysis
 - No overlap in alt purchase/ item view pre purchase



Compass Creative Services created the Nectresse display advertising to launch the brand online, pageviews have increased 4x.

Source: Amazon Internal Data

Hero Quick Promo 18 Months Ago

Sugar In The Raw Single Serve Packets (Pack of 400)
by Domino

List Price: ~~\$16.00~~
Price: **\$12.72** (\$0.32 / count) & eligible for **FREE Super Saver Shipping** on orders over \$25. [Details](#)
You Save: \$3.27 (20%)

In Stock.
Ships from and sold by Amazon.com. Gift-wrap available.

Want it delivered Wednesday, August 17? Order it in the next 1 hour and 56 minutes, and choose **One-Day Shipping** at checkout. [Details](#)
3 new from \$11.95

Extra 30% Off Splenda Sweetener
Save 15% when you enter code **SPLNDAES** at checkout. Plus, save an additional 15% when you combine the instant rebate with your Subscribe & Save option, bringing your total savings to 30%. Offer valid through August 31, 2011. [Learn more.](#)

Product Features

- Pack of four hundred, 0.16-ounce per unit (a total of 64 ounces)
- Never bleached or over processed
- Allowing the golden crystals to retain their natural molasses
- Brings out the extra flavor and richness that nature intended

Item Detail Page Today

Sugar In The Raw Single Serve Packets (Pack of 400)
by Domino

List Price: ~~\$21.30~~ (\$0.33 / count)
Price: **\$21.30** (\$0.33 / count)
In Stock.
Ships from and sold by [Eden's Edge LLC](#)

Ordering for Christmas? Based on the shipping schedule of Eden's Edge LLC, shipped **Standard** at checkout for delivery by December 24.

Holiday Guide to Food & Entertainment
Whether you are hosting a holiday party, taking stock of looking for that perfect gourmet gift, shop the [December holiday guide](#) and more.

Product Features

- Pack of four hundred, 0.16-ounce per unit (a total of 64 ounces)
- Never bleached or over processed
- Allowing the golden crystals to retain their natural molasses
- Brings out the extra flavor and richness that nature intended

Frequently Bought Together

Price For All Three: \$45.89
Add all three to cart. Add all three to cart. These items are shipped from and sold by different sellers. [Show details](#)

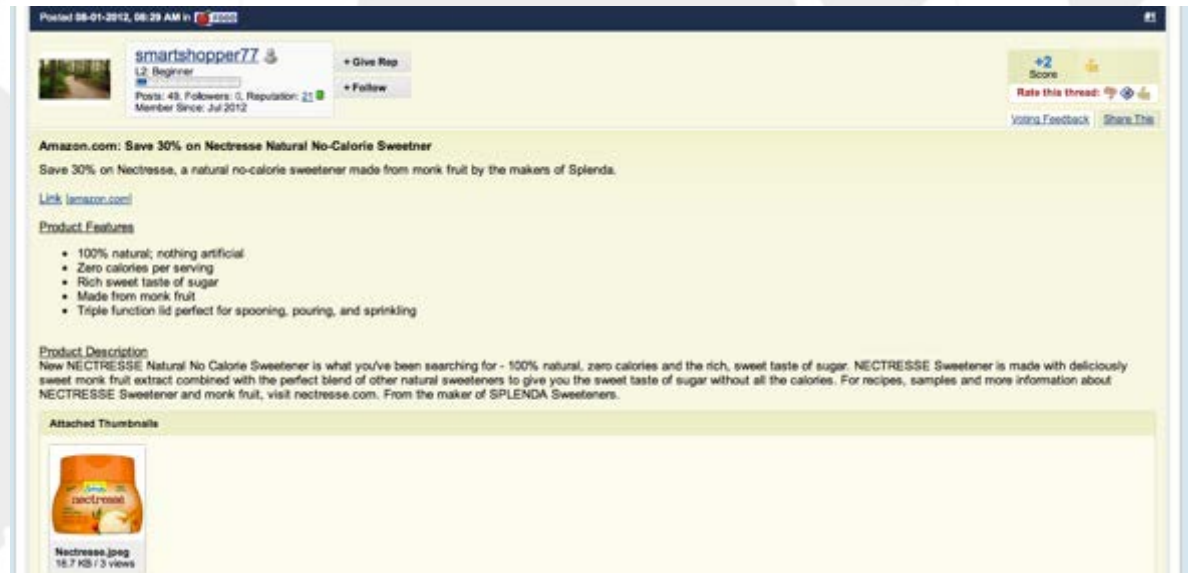
Customers Who Bought This Item Also Bought

Important Information

Targeted display ads, derived by analyzing market basket data, have resulted in 6x lift in the number of Splenda 400ct purchasers who have viewed Sugar in the Raw page and residual impact has resulted in Splenda branding on Sugar item detail page

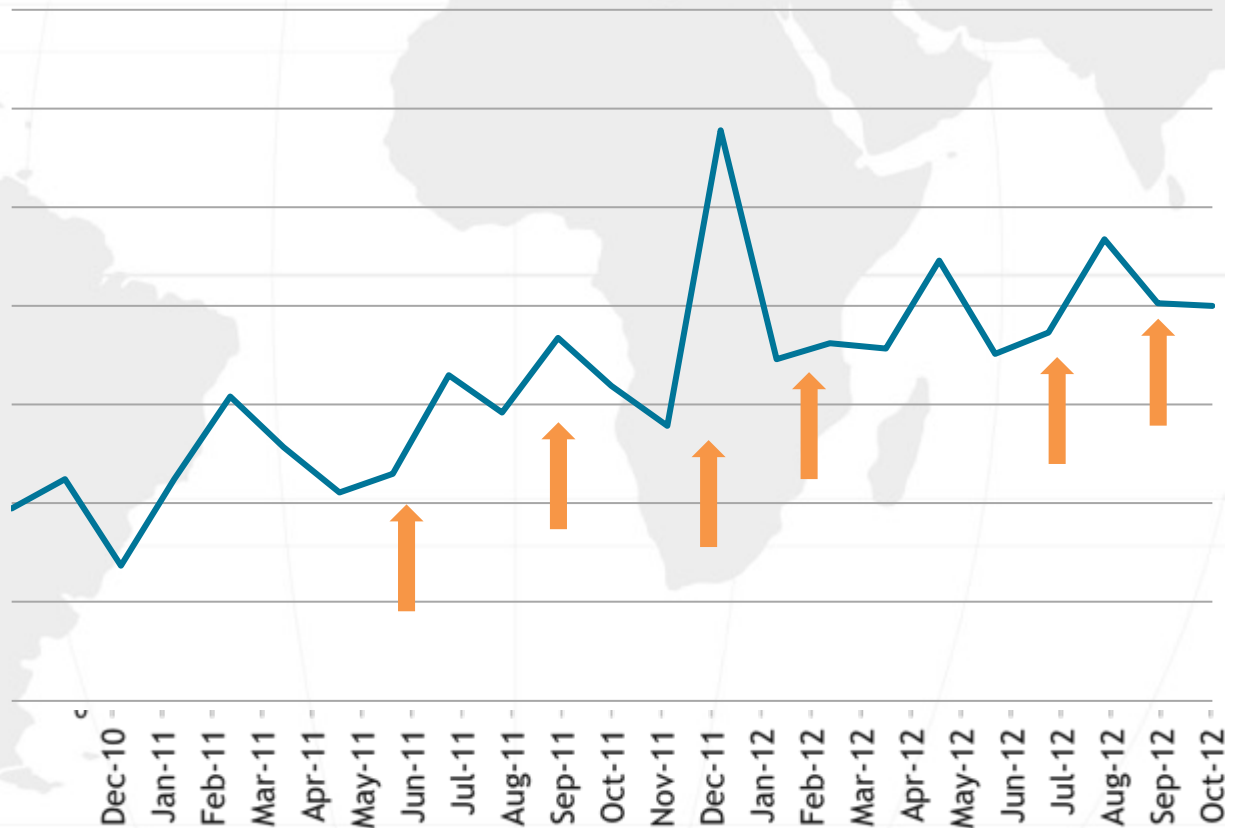
Source: Amazon Internal Data

- Compass Analysts maintain personas on slickdeals.net and other sites to drive organic traffic to J&J brands
- Recently built Visual Basic program to expedite gap analysis and replenishment status challenges



Splenda COGS

- By driving SNS participation, promotions have a long-term impact on sales
- The base is often reset higher
- Sales up 3.5x in fewer than two years



Source: Compass Research, Amazon Internal Data

Internet Packaging

- Cost savings to manufacturer, customer and retailer
- Better customer experience leads to better reviews
- More sales
- Stronger partnership with Amazon--
Merchandizing



K-Cup Example

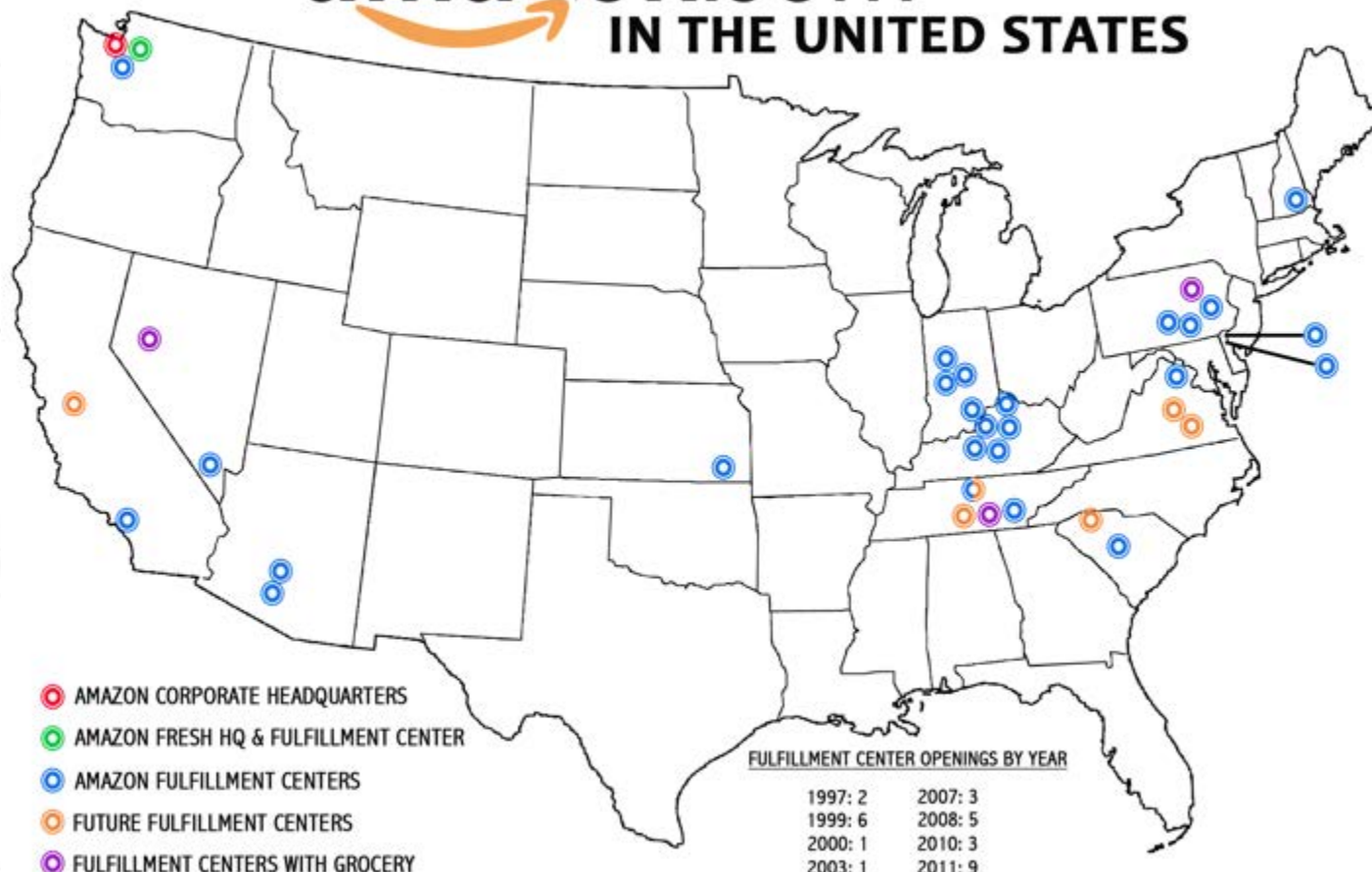
	Traditional Package	Frustration-Free Package	Savings / Change
Package Weight	.55	.45	17%
Number of Pack. Pieces	4	1	75%
Shippable Packaging	No	Yes	Overbox

Costs of Prep

- Bagging \$.44
- Bubble Wrap \$.70
- Boxing \$1.20
- Stickering \$.24

Source: Amazon Internal Data

amazon.com IN THE UNITED STATES



FULFILLMENT CENTER OPENINGS BY YEAR

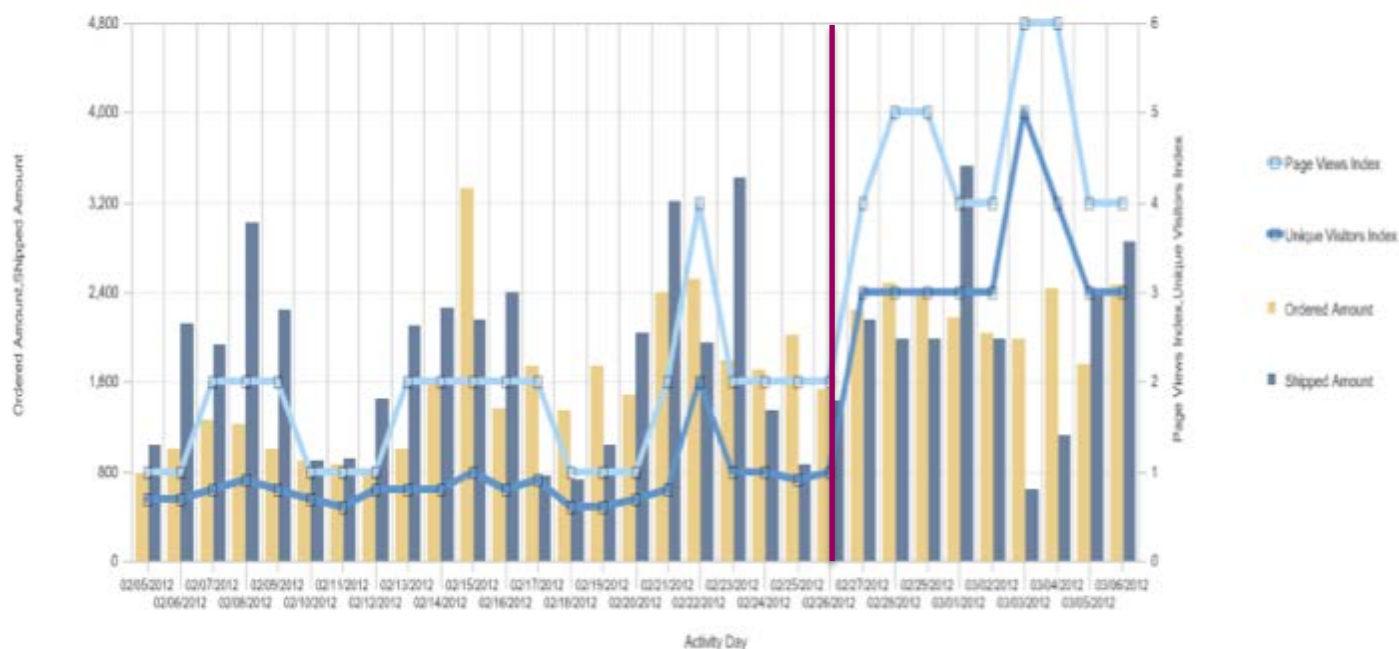
1997: 2	2007: 3
1999: 6	2008: 5
2000: 1	2010: 3
2003: 1	2011: 9
2005: 3	2012: 7
2006: 1	2013: 2 (PLANNED AS OF JULY 2012)

SOURCES: FULFILLMENT CENTER ADDRESS LIST (AMAZON VENDOR CENTRAL), MRPV INTERNATIONAL INC. (<http://www.mrpv.com/vtk/amazon.com/vtk/>), BUSINESSWIRE ARTICLES ABOUT FUTURE OPENINGS

* TOTAL # OF OPENINGS DOES NOT MATCH NUMBER OF LOCATIONS ON MAP DUE TO CLOSINGS

- Market Basket
- Page Views
- Conversion
- Trends vs Category
- Trends vs Competitors
- Category Share
- Geographic Sales
- Real-time Sales
- Item View Pre-purchase
- Search Terms
- Alternate Purchase

Trailing 30 Days Traffic and Sales



Pageviews up 230%

Uniques up 375%

Sales up 45%

Conversion percentile
93%

- 
- Thanksgiving Day
 - Online sales increased 32% to 633 million
 - Black Friday
 - Online sales increased 26% to \$1.024 billion
 - Cyber Monday
 - 17% increase in online sales to \$1.98 billion
 - Sales from mobile devices, including tablets, is now 30% (17% in 2011)
 - 52% increase in Amazon sales

Sources: comScore, Bloomberg, CNBC, TechCrunch, Reuters, Adobe, Channel Advisor

amazon.com[®] | WHAT'S NEXT

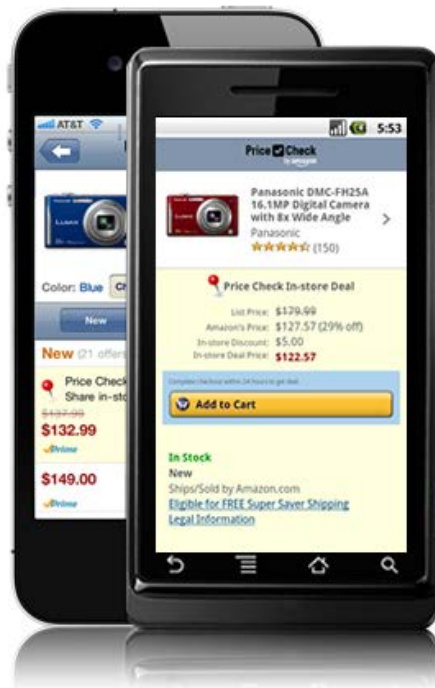
HELPING **GREAT COMPANIES**
DO **GREAT THINGS**

- US Mobile Commerce sales grew 91% to \$6.7 billion in 2011
- 80% of smartphone users shopped with their phone in July 2012
 - Amazon accounted for 50% of the traffic



Price Check for iPhone and Android

Is that deal really a deal? Take Price Check by Amazon with you to make sure.



Get extra savings on December 10

Get a 5% discount (up to \$5) on select items in electronics, toys, sports, music, and DVDs, just by checking a price. Redeem this offer up to (3) times - a savings of up to \$15. Just look for the "Get deal" button on qualifying products.

Check prices instantly: Scan It, Snap It, Say It or Type It

Use barcode scanning, camera, speech or text search to find the lowest prices from Amazon.com and our merchants.

Share in-store prices

With every in-store price you share, you help ensure our prices remain competitive for our customers.

Download the free Price Check app to get started

If you're already a Price Check user, simply download the latest version.



Download from the
Amazon Appstore for
Android

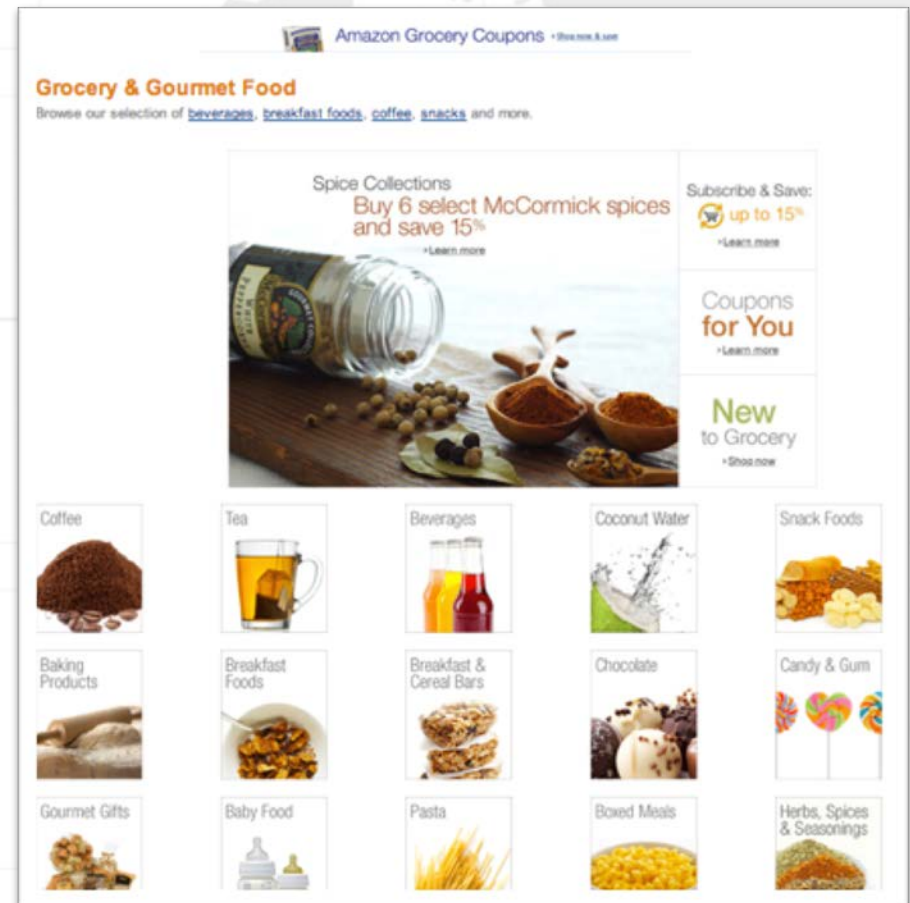


Search for "Price Check by
Amazon" in the Android
Market

Source: eMarketer, Dec 2011; Amazon, Internet Retailer

Amazon Grocery

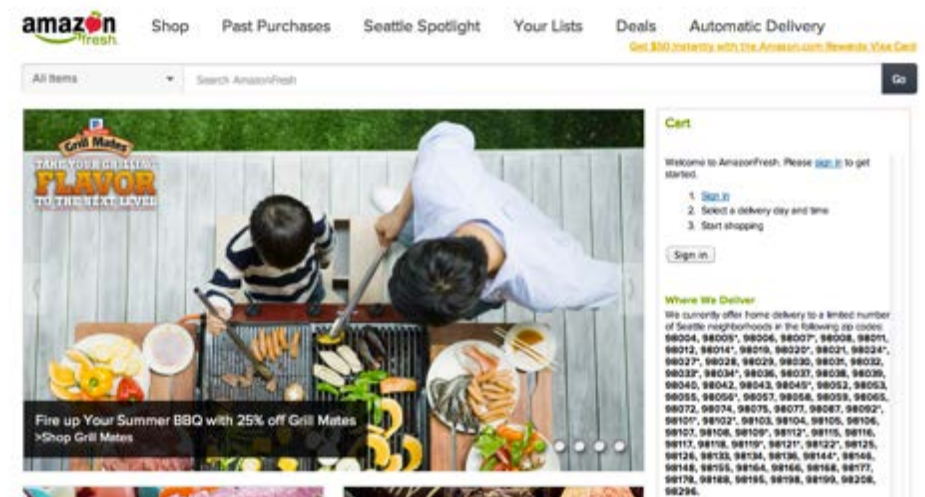
- Recipes
- Triggers on grills, cooking items
- B2B/ Food Service
- Targeted, opt-in sampling
- Basket building for holidays—virtual bundles
- Rich content, html and videos
- Targeting key demos, ie Moms, students



Source: Amazon Internal Data

Amazon Fresh

- Full line home grocery service to 1.5mm Seattle residents
- Own fleet of Amazon trucks
- Convenience Driven—pre dawn is most popular delivery option.
- 14% of orders are via mobile
 - 40 second goal
- 40 software developers on staff and plan to double this year
- Aggressive expansion planned



Source: Amazon Internal Data

Amazon Fresh Recipe Initiative

- Custom to the user
- Basket building
- Quick meals
- Instant adds to the cart

The screenshot displays the Amazon Fresh interface. At the top, a navigation bar includes links for 'Good Afternoon, Jill', 'Upcoming Deliveries', 'Messages (1)', 'Your Account', and a delivery time selector. Below this is a secondary navigation bar with 'Shop', 'Past Purchases', 'Seattle Spotlight', 'Your Lists', 'Deals', and 'Automatic Delivery'. A search bar is prominently featured.

The main content area shows a recipe for 'Summer Fettucine'. It includes the yield ('Serves 4'), prep time ('30 minutes'), and a link to 'View recipe on Epicurious'. The ingredients list is as follows:

- 12 ounces fettucine (3/4 box)
- 1 tablespoon olive oil
- 2 leeks (white and light green parts)
- 4 cloves garlic, thinly sliced
- kosher salt and black pepper*
- 1 cup corn kernels (from 1 to 2 ears, or frozen)
- 1/2 cup dry white wine, and other words that make this long to show indentation style
- 3/4 cup Organic Valley Heavy Whipping Cream, 1 Pint
- 2 cups baby arugula (1 1/2 ounces)
- 1/4 cup Organic Valley, Shredded Parmesan Cheese

A large image of the prepared dish is shown. Below the recipe, a section titled '9 of 10 ingredients available below' lists items with their prices and availability status:

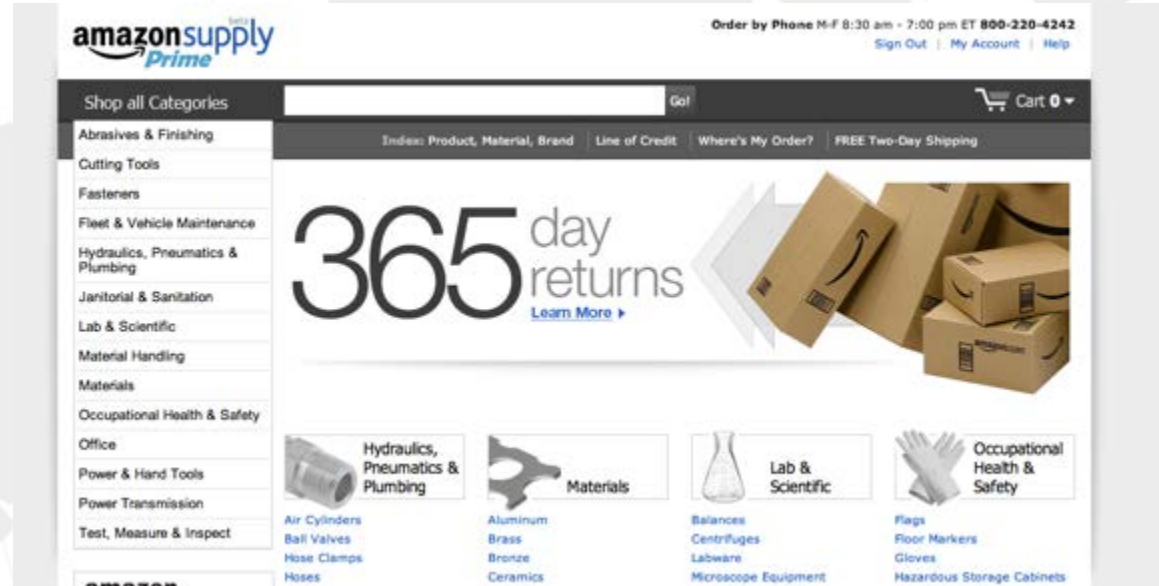
- Organic Valley Heavy Whipping Cream, 1 Pint: \$3.02
- Organic Valley, Shredded Parmesan Cheese, 4 oz: \$6.32
- Cucina Fresca Fresh Handmade Pasta, Fettucine, 10 oz: \$6.55
- Leeks, Organic, 1 Bunch (Washington): \$1.47
- Garlic, Organic, 1 Head (United States): \$0.99

To the right of the recipe is a 'Proceed to Checkout' button and a 'Subtotal \$75.10 (24 items)' display. Below this is a promotional banner: 'Are you a Big Reddish? Spend \$172 more this month for free delivery in September.' The shopping cart is visible on the right side of the page, listing items like 'Fresh Express Organic Baby Spinach', 'Amy's Organic Marinated Tofu', and 'Amy's Organic Roast Beef'.

Source: Amazon Internal Data

Amazon Supply

- Aimed at business, scientific, food service, and commercial customers
- More than 500,000 items, same shipping terms as .com, offers lines of credit
- Will be implementing SNS, product accessibility by customer, contract pricing
- Fastest growing category in Amazon, contractual pricing by end of year, EDI punch out done by this year.



Source: Amazon Internal Data

Amazon Marketing Services

- Brand stores just launched
- Compass was pre-launch partner and provided recommendations to product manager
- Convergence of sales and marketing
- Couponing and ad platforms still to launch

amazonmarketingservices

FAQ

Register Your Brand

Sign In

Grow Your Brand with Amazon.com

Amazon Marketing Services is a suite of self-service tools that enhance your ability to meet your marketing objectives. Encourage customers to learn about your brand and buy your products with free, customizable Amazon Pages. Use Amazon Posts to deliver social content to current and potential customers. Measure your impact and learn about your audience with Amazon Analytics.

[Register your brand](#)

Registration is free. We review all applications to help ensure access by authorized representatives only.



Amazon Pages

Reach Amazon.com customers on your dedicated landing page.

[Learn more](#)

Amazon Posts

Engage your audience on Amazon and Facebook using enhanced social messaging tools.

[Learn more](#)

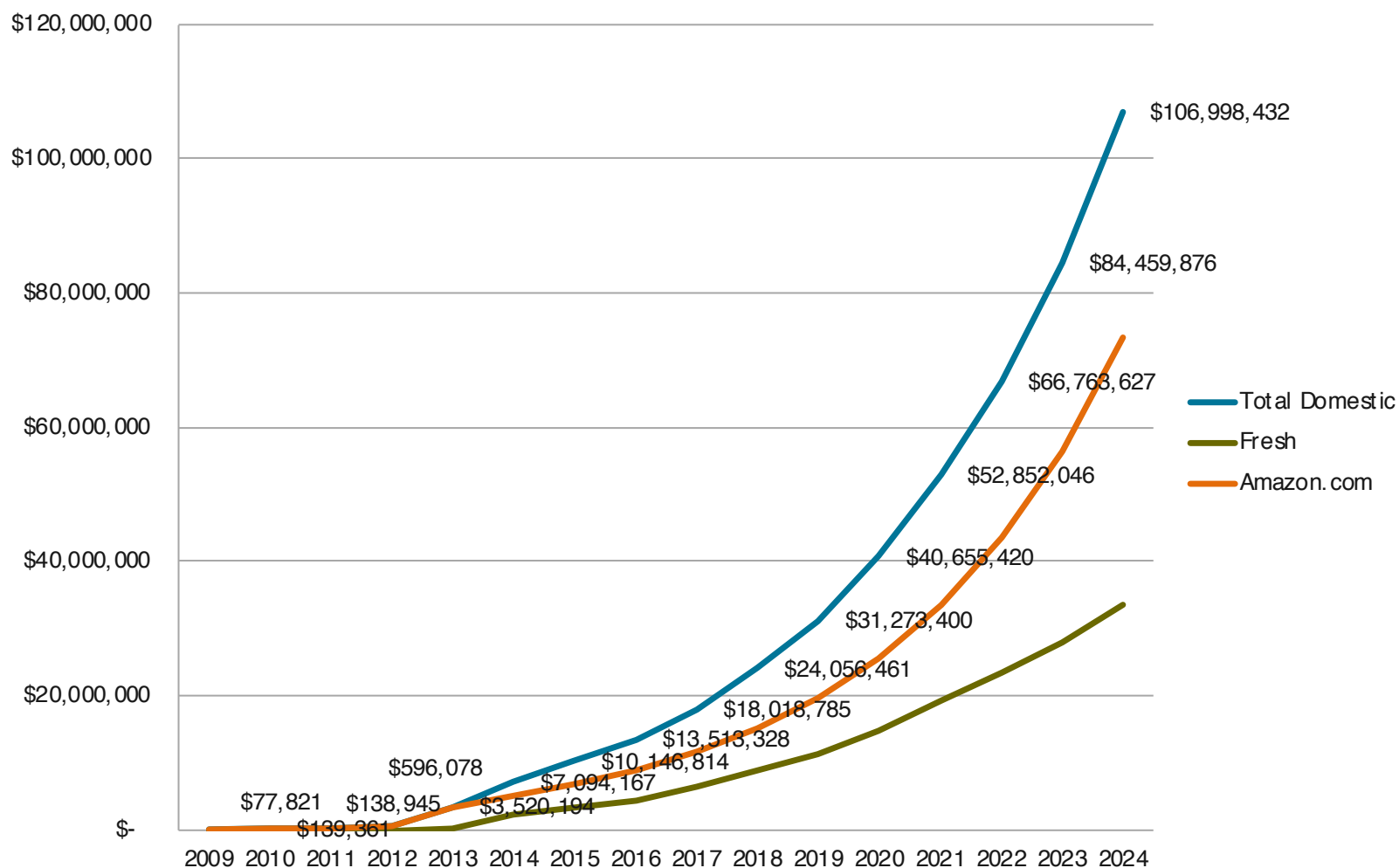
Amazon Analytics

Deliver marketing that works. Measure your impact and refine your efforts to drive results.

[Learn more](#)

Source: Amazon Internal Data

Amazon US Growth Potential



Source: Amazon Internal Data

Product Placement

- ID Key Retailers
- HQ Buyer Assessment
- Category Assessment (s)
- Product Registration
 - Dimensions
 - Descriptions
 - Images
 - Unique Attributes
 - ID Potential MSRP-- Bundling
- Merchandising
 - Category Placement
 - Information Architecture
 - SEO
 - Adjacency
- Develop Digital Planogram

Promotion

- Category Analysis
- Demographic Assessment
- Calendar Alignment
- Targeting Options
 - Behavioral
 - Demographic
 - Search
 - Retargeting
 - Geography
 - E-mail Follow-Up
 - Market basket
 - Browse History
- A/ B Test & Learn
- Purchase Subscription
- Seed Reviews (Vine)
- Social Media Tie-in
- Mobile Media Opportunities

Analytics

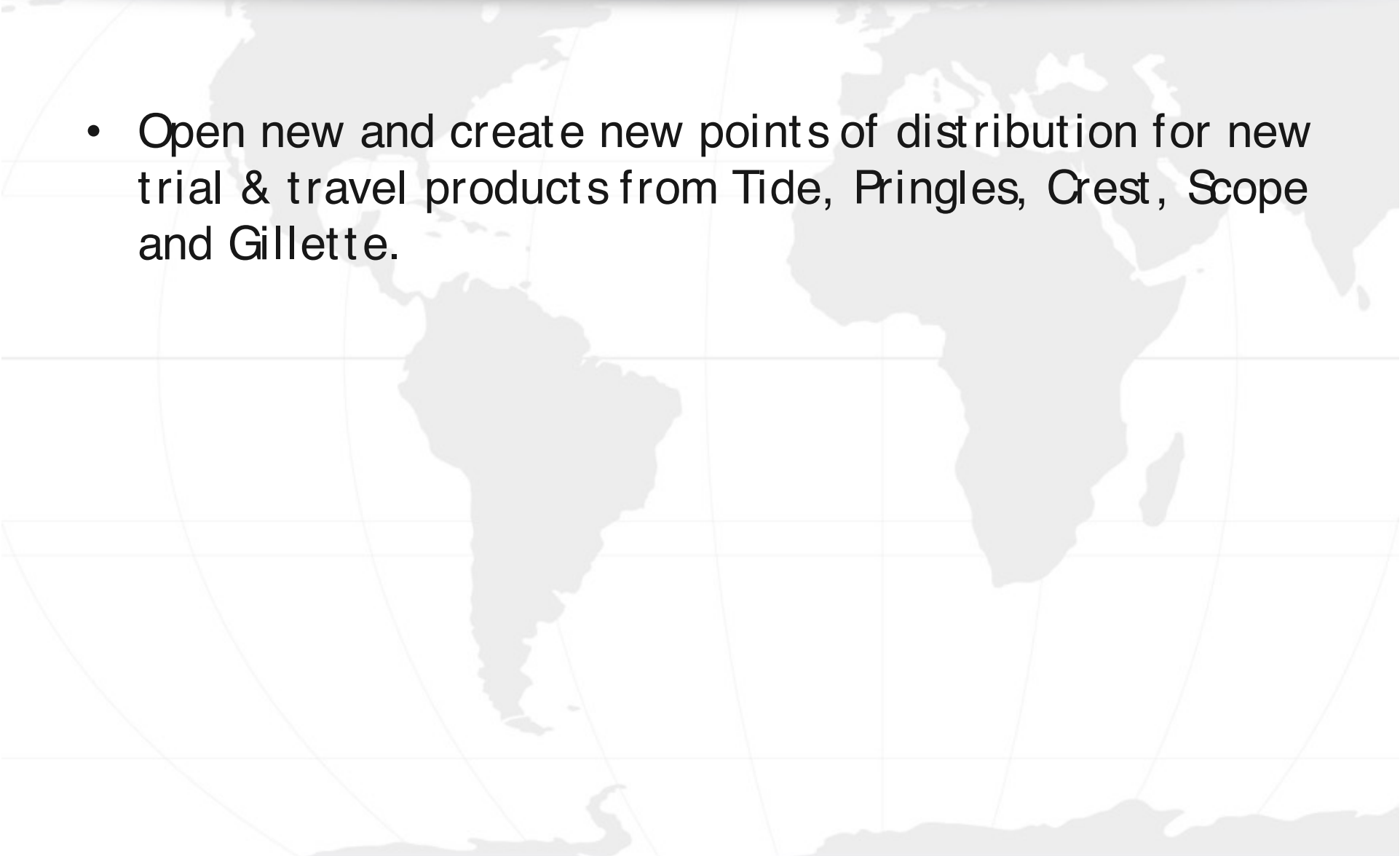
- Market Basket
- Search Terms
- Alternate Purchases
- Pre Purchase Views
- Compare to FDM
- Page Views
- Conversions
- Geographic
- Inventory projections
- Index Sales and Conversions to Category
- Competitor Comparisons

Customer Service

- Inventory Management
- PO Management
- Fulfillment Management
- Invoice Reconciliation
- Implement Price Increases
- Co-op Agreements
- Deduction Reconciliation
- Invoicing Support
- ASN Support
- Shipping Logistics
- Vendor Scorecard Management
- Supply Chain Logistics

CLIENT SUCCESSES

HELPING **GREAT COMPANIES**
DO **GREAT THINGS**

- 
- Open new and create new points of distribution for new trial & travel products from Tide, Pringles, Crest, Scope and Gillette.

CLIENT SUCCESSES

ACCOMPLISHMENTS

Compass⁺ MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS

84,142 New Doors

- Pringles
- Number of Doors – 20,07
- Tide to Go
- Number of Doors – 7,773
- Duracell
- Number of Doors – 16,257
- Trial Size/ HBC
- Number of Doors – 40,040



42% Growth in Number of Doors!

CLIENT SUCCESSES

CUSTOMER CHALLENGE



Let's Build Something Together™

Compass MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS

Convince Lowe's to add Consumer Products.



CLIENT SUCCESSES

LOWES

Compass⁺ MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS

- 1,710 Locations



HBA POG

2 Locations by 2 high velocity registers

(shelf image may not be correct)



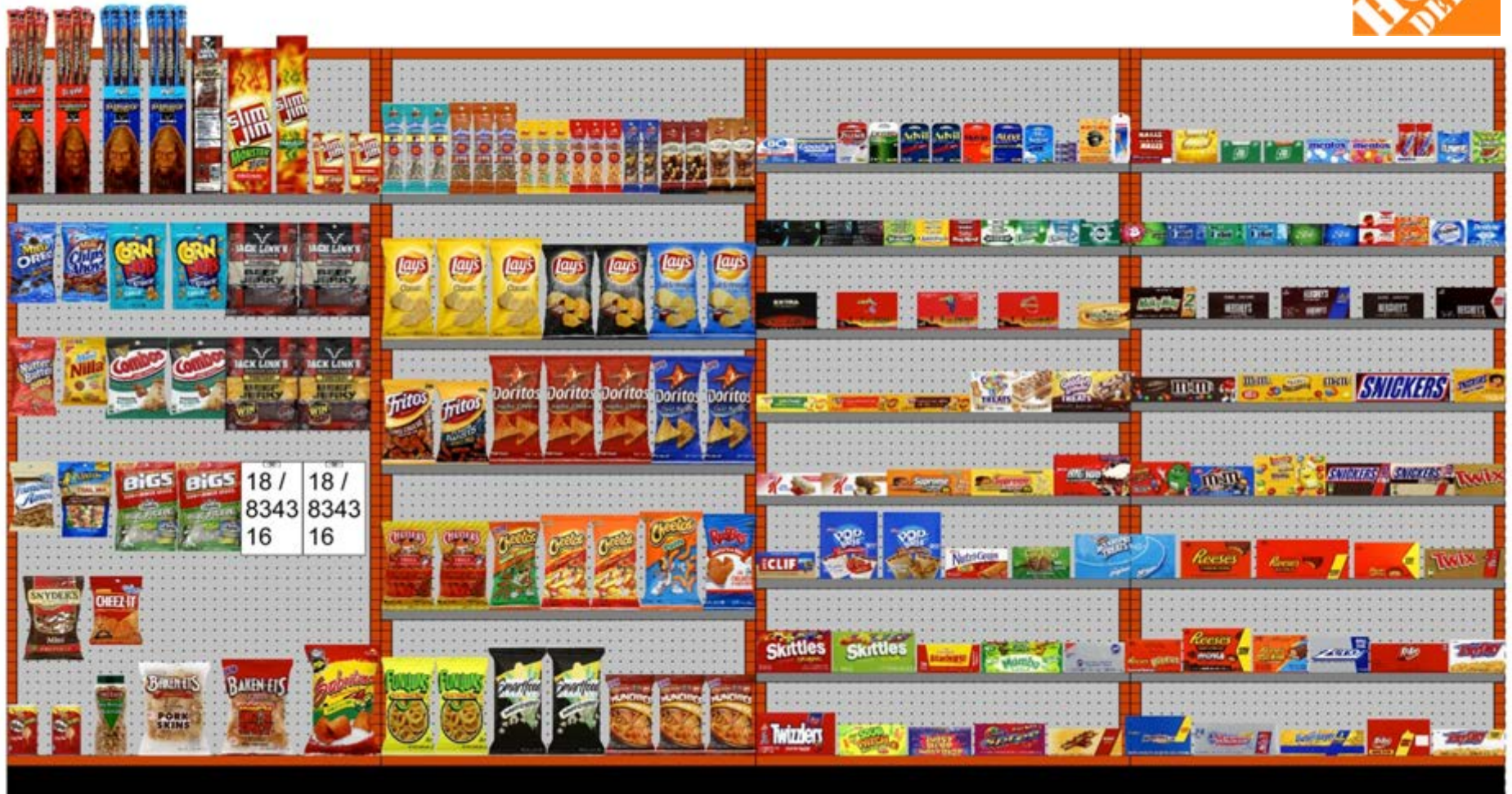
POG from Left to Right	Description	Manufacturer Name
1	ADVIL VIAL 10PC PEG 12CT-015110	PFIZER
2	TYLENOL ES GO PACK 6PC 6CT-044406	JOHNSON AND JOHNSON
3	ALEVE TABLET 10PC VIAL PEG 6CT-53935	BAYER HEALTHCARE
4	CLARITIN ALLERGY 10MG 5PC 6CT-80317	MERCK
5	ZYRTEC ALLERGY 24HR 3PC- 6CT 020443	JOHNSON AND JOHNSON
6	ALKA SELTZER PLS COUGH COLD LIQ GEL 10CT-54264	BAYER HEALTHCARE
7	HALLS STICK CHERRY 9PC 20CT-6247600	CADBURY ADAMS
8	PEPTO BISMOL ORIG CHEWABLE 12PC 8CT-32040	PROCTER AND GAMBLE
9	TUMS ULTRA ASSRT BERRY ROLL 12CT-074670	GLAXOSMITHKLINE
10	J&J FIRST AIDE TRAVEL KIT 6CT-008295	JOHNSON AND JOHNSON
11	NEOSPORIN OTG .5OZ - 6CT 23740	JOHNSON AND JOHNSON
12	BLISTEX MEDICATED LIP SPF15 CARD .15OZ 24CT-83120	BLISTEX
13	VISINE OTG ADVANCE RELIEF .28OZ - 6CT 08146	JOHNSON AND JOHNSON

CLIENT SUCCESSES

Compass⁺ MARKETING
INCORPORATED

HELPING GREAT COMPANIES DO GREAT THINGS

- Pro-Contractor Set located at checkout (Mars 15 items, Kellogg's 9 items, J&J 1 item, Diamond Foods 1 item, P&G 1 item)



- Space Management Services

- Maintain all 3 POG software systems
 - SpaceMan, SpacePlan-JDA, Apollo
- Output in all 3 Formats



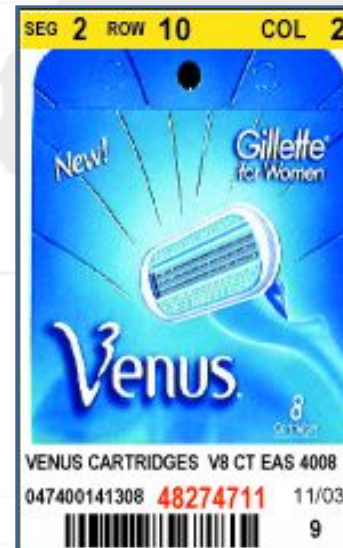
- Image Merchandising Solutions

- Pre-printed shelf strips/ peg tags displaying product images and/ or price stickers.
- Help maintain POG compliance by visually displaying proper shelf spacing and placement.



Image Merchandising Solutions

The turn-key solution that delivers the value of images in the store.



From: Lisa Shapiro [mailto:lsshpr@yahoo.com]

Sent: Tuesday, February 02, 2010 9:18 AM

To: John Adams

Subject:

John:

Compass Marketing is the Category Captain of the Health and Beauty section for Barnes & Noble College Booksellers.
Thank you for all your support!!

Lisa M. Shapiro

Merchandise Manager, Food and Beverage

BARNES & NOBLE
COLLEGE BOOKSELLERS

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From: Shea Shedeed
[mailto:sshedeed@thesportsauthority.com]
Sent: Monday, February 08, 2010 11:57 AM
To: Jim Wenz
Subject: RE: front end POG

YES, YOU ARE MY CATEGORY CAPTAIN and I thus, I am requesting your assistance in my front-end renovation project.



WHY THE COMPASS TEAM? BECAUSE WE ...



HELPING GREAT COMPANIES DO GREAT THINGS

- Have over 300 years of combined Consumer Product Goods industry experience.
- Have and seek out relationships with our customer's senior management (i.e. Staples, QVC, OfficeMax, Hudson News).
- Are often designated as category captains for Consumer Product Goods by our customers.
- Have a full-service marketing department.
- Are uniquely positioned to leverage each customer's business units because of our many clients and customer knowledge and expertise.
- Understand the complexity of our customers and develop unique logistical solutions.

We know the ins/ outs of our customer's routing guides, ordering processes, distribution processes, hierarchy, labeling requirements, special pack sizes, promotions, unique payment terms, credit applications.

- Represent a growing and diverse bag of key CPG Brands that our customers know and respect and need.
- Call on our customers every month and often host Vendor Days at Compass.



Compass⁺ **MARKETING**
INCORPORATED

THANK YOU!



HELPING **GREAT COMPANIES**
DO **GREAT THINGS**